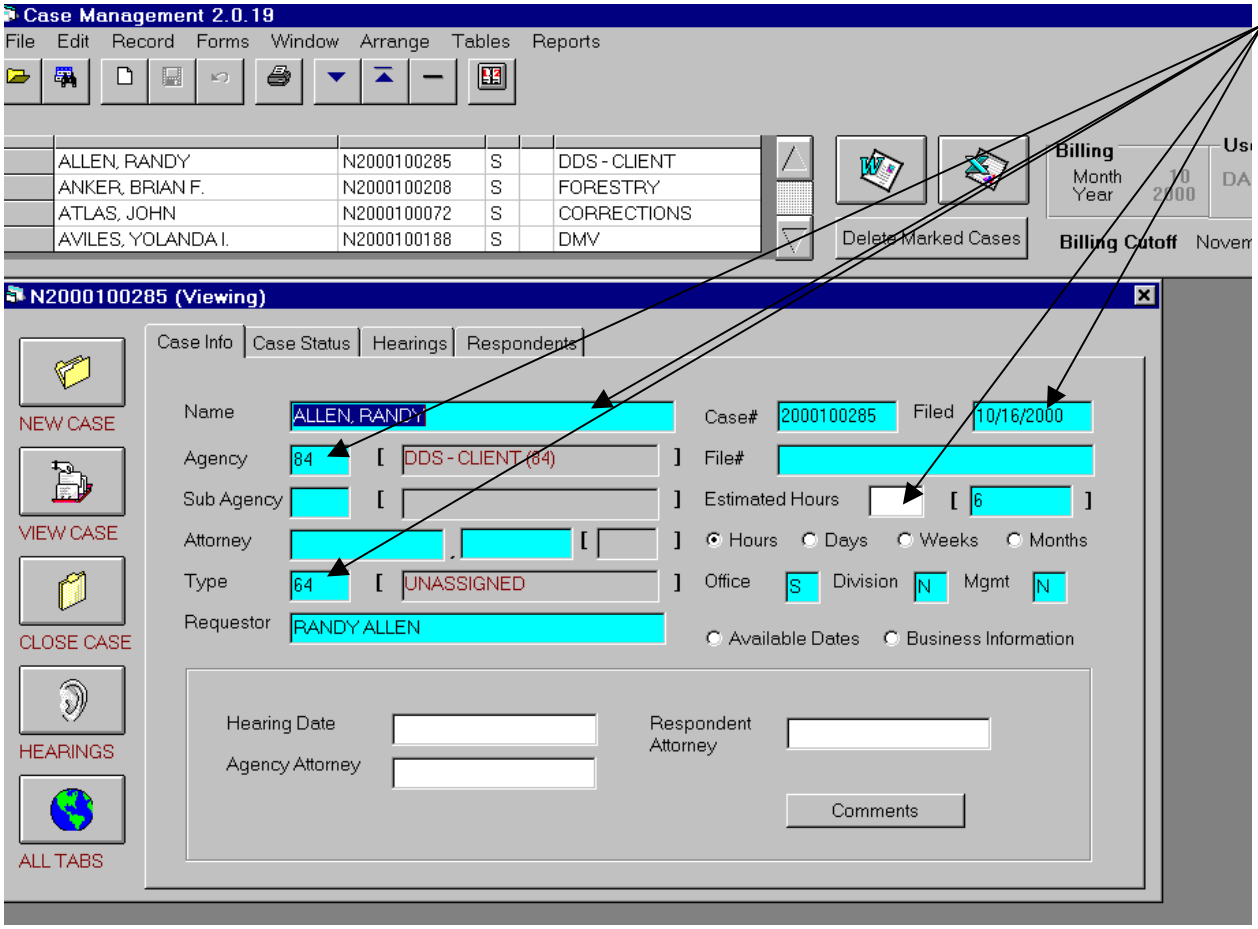
Detail of Open New Case



Grid at top is current month's cases by Office. Cases appearing in the grid are determined by login name.

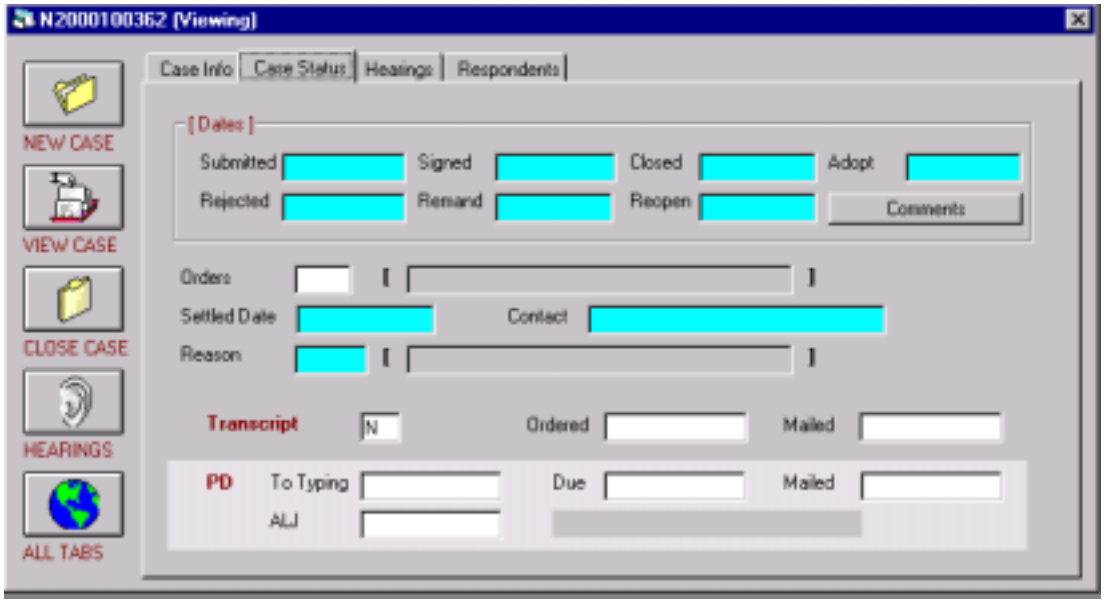
Field	Description	Field Type
NAME:.	Case Name is Respondent's Name, last name first, all in caps Business Name all in caps	Varchar(30)
CASE #:	Automatically generates case number when case is saved. Format is 4 digit year YYYY, 2 digit month MM, 4 digit numeric increment. Ex. 2002080001.	Varchar(10)
FILED:	Request to Set Form stamped received. This date must be current month since case number is based on year and month there is a need to keep them consistent.	Datetime(8)
Agency:	Double click this field to show a drop-down list of Agencies. Agency # is a number OAH has assigned to each agency we do business with. OAH has state and non-state agencies. Currently only the non-state agencies have subagencies associated with them and upon saving the case record, you will	Int(4)

	be prompted to enter a subagency.	
File#:	Most agencies have their own case or file numbers and this usually appears on the Agency documents.	Varchar(20)
SubAgency:	Double click to show drop-down list of sub-agencies based on the agency selected. Currently only "non-state" agencies require this info. NEW: Add subagency for some agencies as well, i.e. 75, 80, 84, and 86	Int(4)
Estimated Hours:	1 day = 6 hours	Float(8)
Select Hours (default), Days, Weeks, Months.	Defines the scope of the estimated ours—(i.e. 3 hours=3hours; 3 days=18 hours; 3 weeks=90 hours; 1 month=120 hours	Bit
Attorney:	Double click field to select an Agency Attorney from a drop-down list. If it's a new agency attorney it must be added first. . This info is on Request to Set Form.	Varchar(30)
Type	Double click on field to select a case type. Case types should be defined when an Agency is added to the system.. This info is on Request to Set Form.	Int(4)
Office	S=Sacramento, O=Oakland, D=San Diego, L=Los Angeles. The default is determined by login name.	Char(1)
Division	N=Northern (Sacramento and Oakland); S=Southern (Los Angeles and San Diego). The default is determined by login name.	Char(1)
Mgmt	Cases scheduled for more than 3 days are marked Y (Yes). The default is N (No).	Tinyint(1)
Requester	Usually the same as the Agency Attorney. Since some cases have no attorney, the requestor's name appears on the Request to Set Form.	Varchar(30)
Available dates	These are the nearest dates parties are available. If not specified by the Agency Attorney, then enter 60 days from filed date	Not a field. More like a tab between available dates and business information data.
Hearing Date	OAH's first available date	Datetime(8)
Agency Attorney	The first date Agency Attorney is available. This is usually on the Request to Set.	Datetime(8)
Respondent Attorney	The first date Respondent Attorney is available. Often this information is not listed so it is left blank	Datetime(8)
Comments	This is rarely used, but could put pertinent information regarding setting the hearing.	
Business Information	NEVER USED. This can be eliminated from the application.	

Requirements that do not exist in the current system

- In addition to the fields above, additional fields should be able to be added or removed based on the requirements of the agency selected. Agency required fields should be defined by the systems administrator. Example: For CSLB Arbitration cases, Original Award Amount, Award Granted or Denied, Award Recipient, Reopen Granted or denied, and Corrected Award Amount Fields need to be added to this form.
- Once the case information is saved, notices should be automatically generated based on the workflow of the agency. This should be defined by the systems administrator.
- Ability to track and enter conversations needs to be added.
- Ability to track documents that have been sent and received.

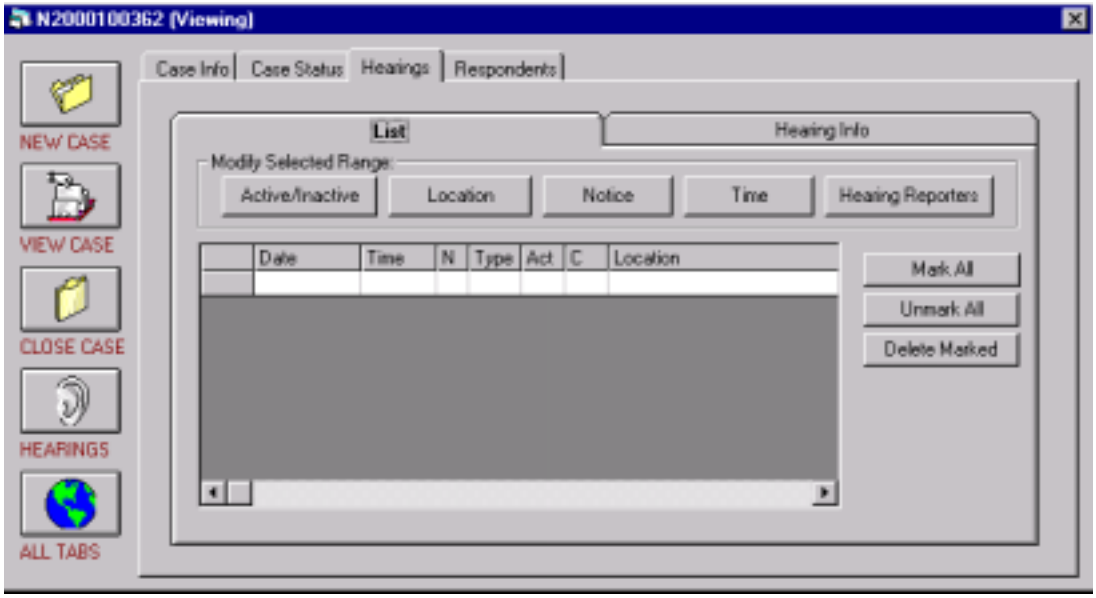
Case Status Tab



Field	Description	Field Type
Submitted:	This is the date the record was close and the case submitted to the ALJ for decision. Entering this date will fill in the "Due" date in the PD (Proposed Deicsion) Typing area.	Datetime(8)
Signed:	This is the date the ALJ signs the PD	Datetime(8)
Closed:	When the signed date is filled in, the date closed will reflect the same date. If the case is not signed, then type in the closed date.	Datetime(8)
Adopt:	This is completed when (and if) the agency returns an "adopted" PD	Datetime(8)
Rejected:	This is completed when the agency returns a "rejected" PD.	Datetime(8)
Remand:	This is completed when a case is remanded to the office or court	Datetime(8)
Reopen:	This is completed when a case has been remanded and is reopened. When the case is reopened, you have to remove the "Closed" date in order for it to be an "open" case.	Datetime(8)
Comments:	Usually filled in when a case reopened. (opens a wordpad window)	
Orders:	Double Click in the textbox for a drop-down list of order types.	Int(4)
Settled Date:	Type in date or double click in the box for a calendar to	Datetime(8)

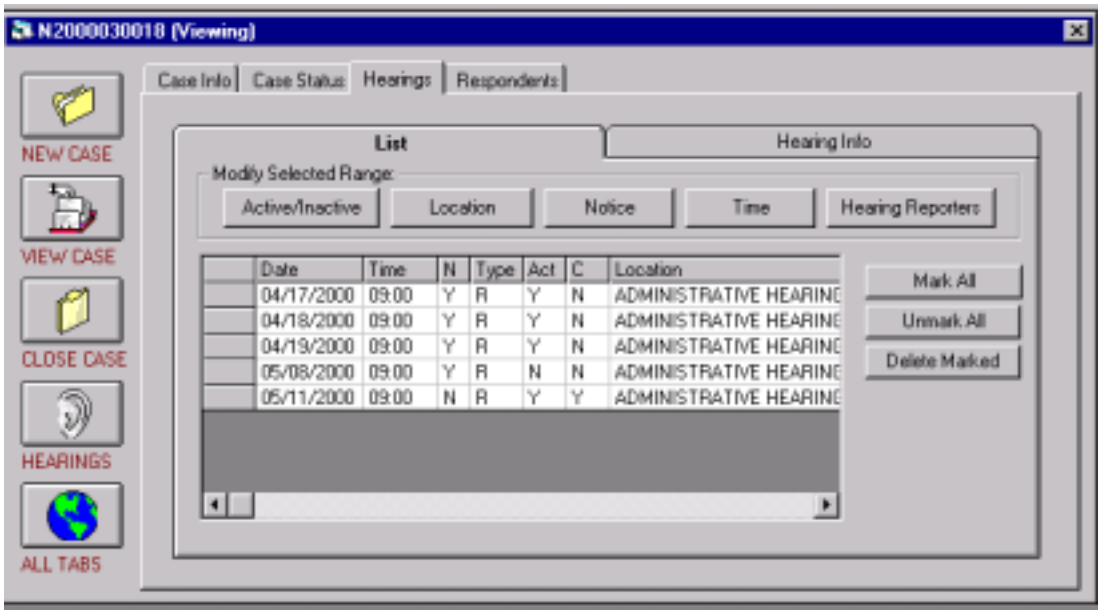
	select from. This information is usually based on a telephone call either to calendar or ALJ.	
Contact:	Person who notifies OAH that case is settled.	Varchar(30)
Reason:	Double Click in the textbox for a drop-down list of Reason codes. Usually the person who notifies OAH that the case is settled will indicate the reason	Int(4)
Transcript:	Y (Yes) or (N) No	Tinyint(1)
Ordered:	Type in date or double click in the box for a calendar to select from. This is the actual date Transcript was ordered by a requesting person or agency, not the date the transcript was ordered from the court reporter.	Datetime(8)
Mailed:	Type in date or double click in the box for a calendar to select from. This is the date the transcript is mailed (or picked up) to the person or agency requesting the transcript	Datetime(8)
PD:	**Proposed Decision Section**	
To Typing:	Type in date or double click in the box for a calendar to select from. This is the date the PD is received from the ALJ into typing.	Datetime(8)
Due:	If the submitted date has been filled in, then this will reflect the due date. If this date is not correct, i.e. even though the case was submitted the ALJ allowed the parties to submit further documentation which extended the case for that period of time. (The due date is actually based on each agency timeline and calculated so that if the date falls on a Saturday, Sunday or Holiday the date will fall on the following business day.)	Datetime(8)
Mailed:	Type in date or double click in the box for a calendar to select from. This is the date PD is mailed to the parties.	Datetime(8)
ALJ:	Double click in the box to select from the pick list or type the employee number for the ALJ.	Int(4)

Hearing Tab



List Tab

This remains disabled until the case is set on calendar. You can either open the calendar or click on the Hearing Info tab. When a case has been set on calendar, the Active/Inactive, Location, Notice, Time, Hearing Reporters buttons become active. Below is a list of hearings that have been set.



Active/Inactive Button - Hearings can be made active/inactive by clicking the active/inactive button. This means that the hearing was not held, but it retains a record of all dates set.

Location Button – Clicking the location button will allow you to edit the location of the hearing selected.
Notice Button – changes the value of the Notice Field from No to Yes. This signifies that a notice of hearing has been sent for the selected hearing.

Time Button – Changes the time of the selected hearing.

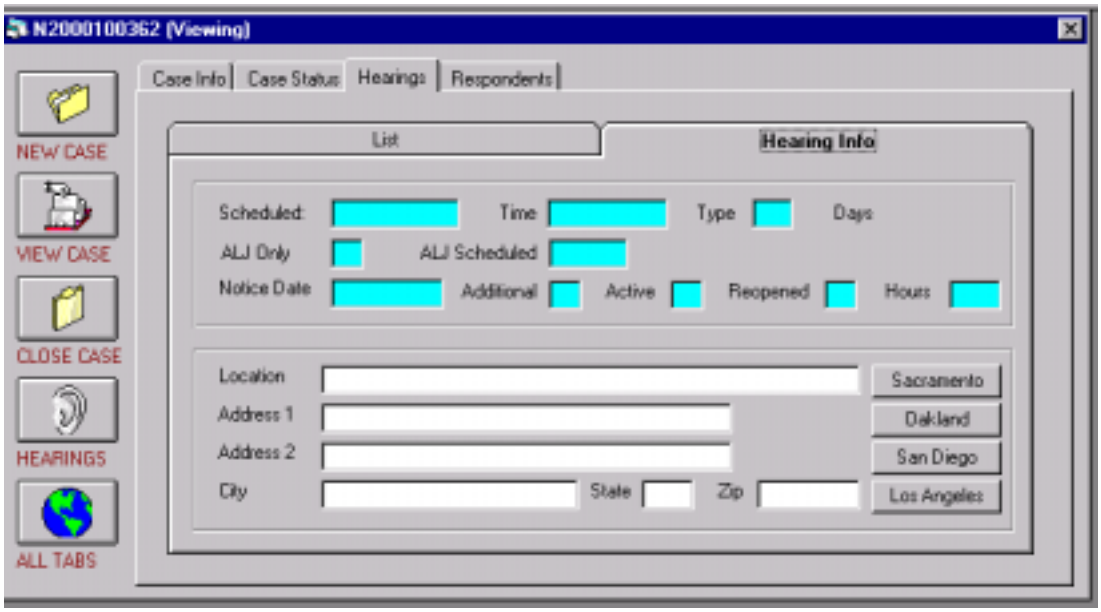
Hearing Reporter Button – Assigns a court reporter to the selected hearing.

Mark All Button – Selects all of the listed hearings.

Unmark All Button – Unselects all of the listed hearings.

Delete Marked Button – Deletes the selected hearings.

Hearing Info Tab



If you double click in any box on this screen it will bring you to calendar where the case can be set on calendar. Note: On future Hearing information, Hearing information should be able to be entered by typing in the information here as well as entering the information in on the Calendar.

All of the shaded fields are read only.
Sacramento Button – Populates the Sacramento office address to the location fields.

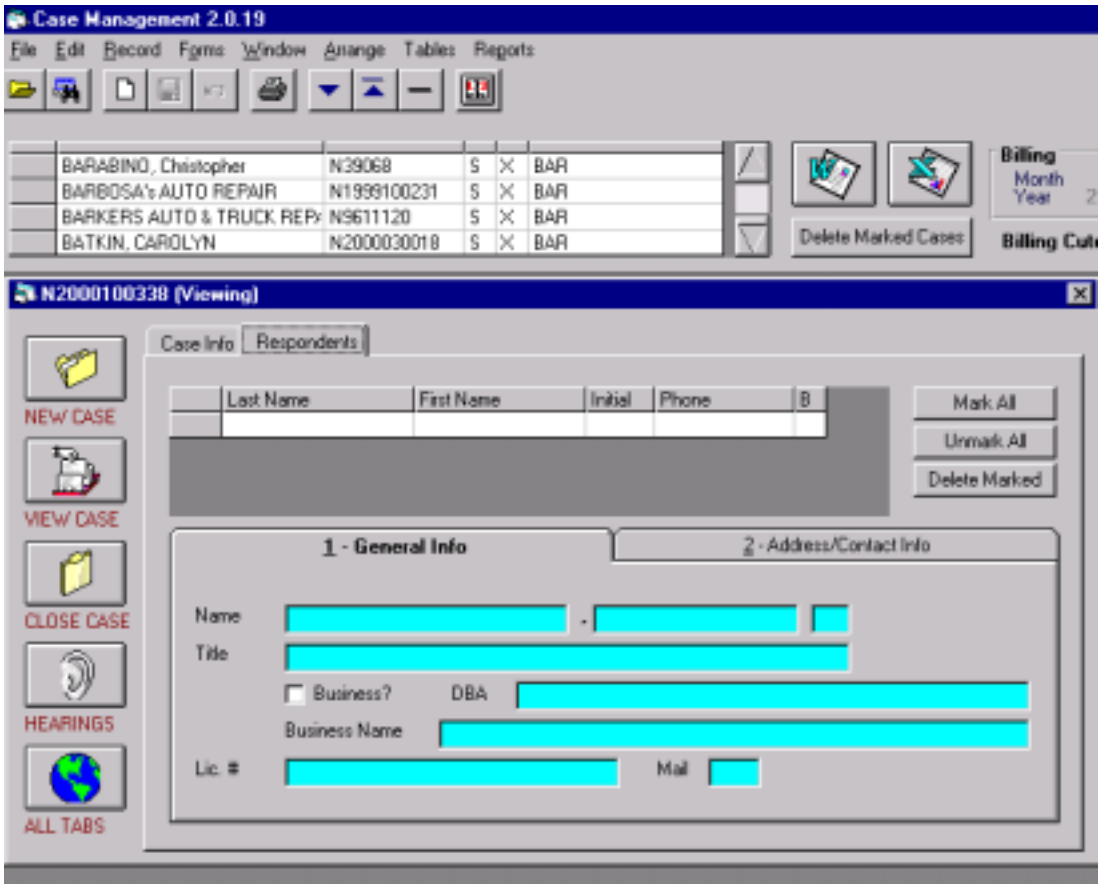
Oakland Button – Populates the Oakland office address to the location fields.

San Diego – Populates the San Diego office address to the location fields.

Field Name	Description	Field Type
Location	Hearing location – Double Click this field to display a drop-down list of pre-defined hearing location	Varchar(30)
Address 1	Hearing location address line 1	Varchar(30)
Address 2	Hearing location address line 2	Varchar(30)
City	Hearing location city.	Varchar(30)
State	Hearing location state.	Varchar(2)
Zip	Hearing location zip code.	Varchar(10)

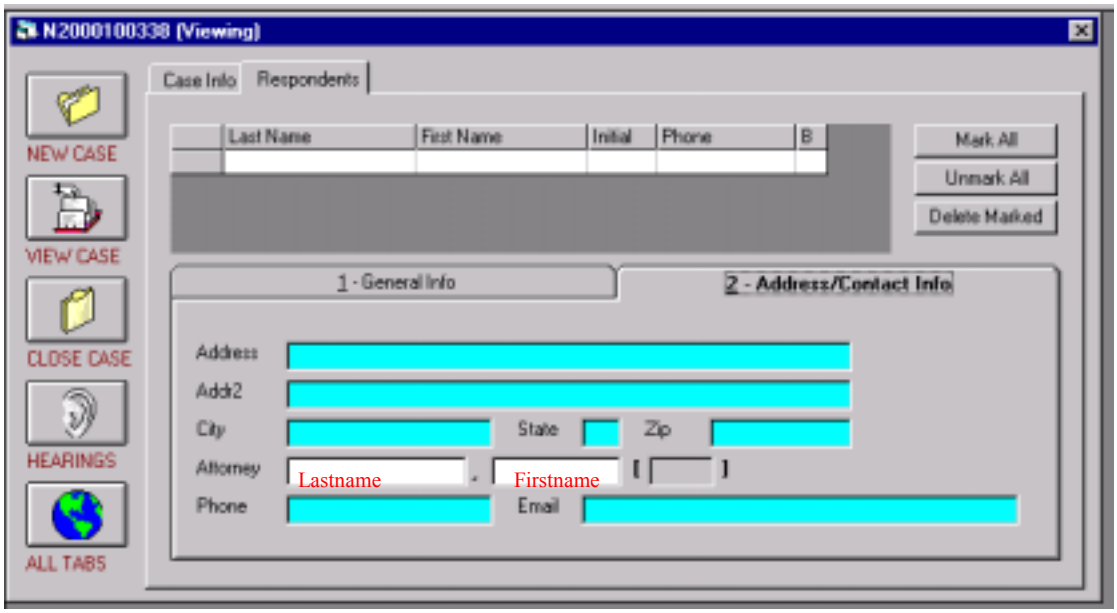
Respondents TAB

1 – General Info Tab



Field	Description	Field Type
NAME:	Last Name first	
	Last Name	Varchar(15)
	First Name	Varchar(15)
	Middle Initial	Varchar(1)
Title:	If known	Varchar(80)
DBA:	"Doing Business As" Enter Business in CAPS	Varchar(80)
Business:	Click "Business" Then you can fill in the Business Name and it makes DBA field unavailable. This information is used on Word Macros.	Tinyint(1)
Lic.#:	License Number, enter if available	Varchar(20)
Mail:	Y (Yes) N (No). Was the Respondent Mailed?.	Tinyint(1)

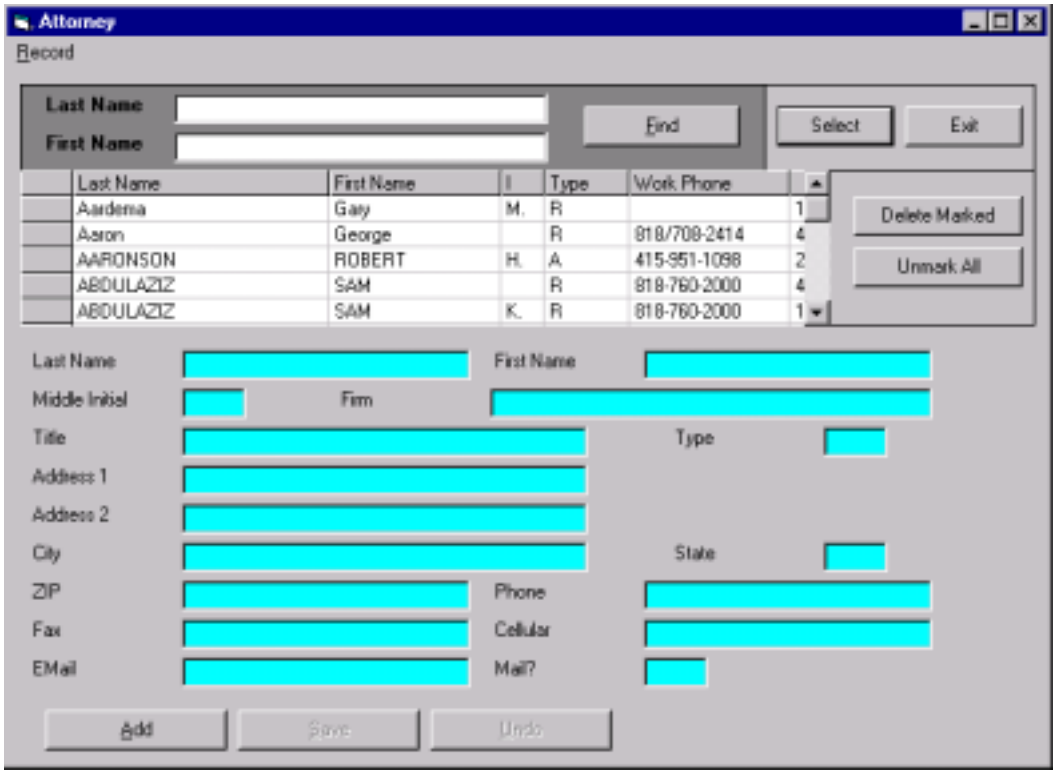
2 - Address/Contact Info Tab



No defaults, no required fields.

Field Name	Description	Field Type
Address:	Respondent's First line of Address, i.e. 1521 J Street	Varchar(25)
Addr2:	Respondent's Second line of Address, i.e. Suite 230	Varchar(25)
City:	Respondent's City Name (no comma)	Varchar(20)
State:	Respondent's Two Letter State abbreviation	Varchar(2)
Zip:	Respondents either 5 digit code or 5 digit code hyphen 4 digits	Varchar(10)
Attorney:	Entry Choices: Enter Last Name and first name of attorney, tab to next field Enter Last Name, then double click to select from list Enter a single letter, then double click to select from list Double click in box and select from the entire list – *See Add Attorney*. If you type a name not on the list, then tab to the next field, the box next to the name has ???? in it. When you save the respondent record, the attorney name disappears. This means you need to add this attorney.	Lastname – varchar(30) Firstname – varchar(30) Attorney ID – Int(4)

To add an Attorney:



Field Name	Description	Field Type
Last Name	Attorney last name	Varchar(20)
First Name	Attorney first name.	Varchar(10)
Middle Initial	Attorney middle initial	Varchar(1)
Firm	Attorney firm name	Varchar(30)
Title	Attorney title.	Varchar(30)
Type	Attorney type: R – Respondent, A – Agency	Char(1)
Address 1	Attorney address line 1	Varchar(30)
Address 2	Attorney address line 2	Varchar(30)(
City	Attorney city	Varchar(30)
State	Attorney state	Varchar(2)
Zip	Attorney zip code	Varchar(10)
Phone	Attorney phone number	Varchar(14)
Fax	Attorney fax number	Varchar(14)
Cellular	Attorney cell number	Varchar(14)
Email	Attorney email address	Varchar(100)
Mail?	Send mail flag (do we send mail to this attorney?) 1 – yes, 2 – No Not used can be deleted	Int(4)

Calendaring Detailed Description

RULES:

All cases can be moved up or down on the same day unless the case is marked ALJ Only. Then the case cannot be moved to another ALJ

Cases with a Notice cannot be moved to another DATE **without a continuance**. If you attempt to move a case with a notice, the continuance screen opens.

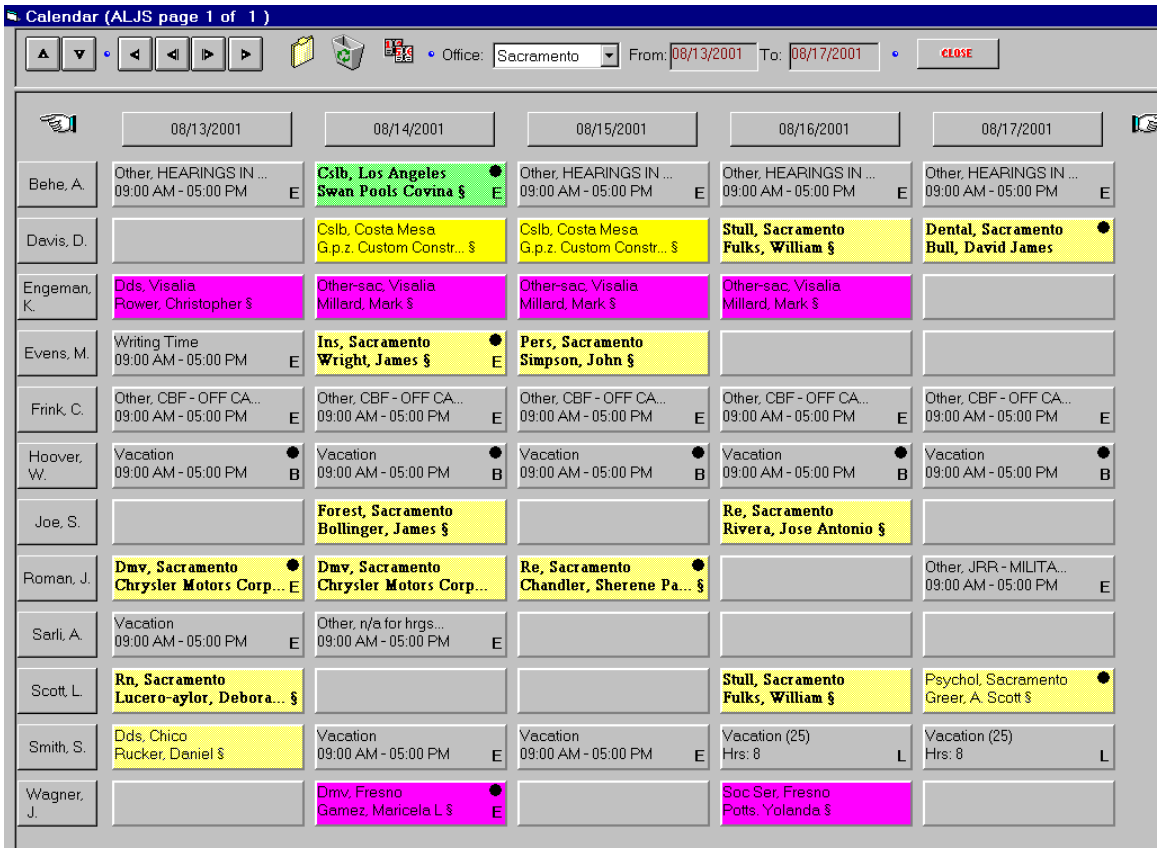
Personal Leave on an ALJ cannot be moved to another ALJ. This is from a timesheet entry.

Events can be moved to another ALJ.

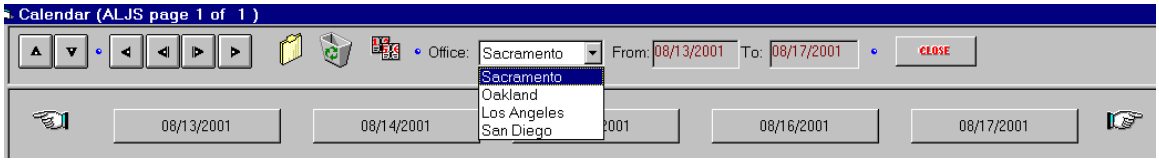
When prompted with "more than 8 hours" user can override. NOTE: A *day* of hearing is considered 6 hours.

CURRENT Calendar functionality:

Initial Calendar defaults to the location of the user.

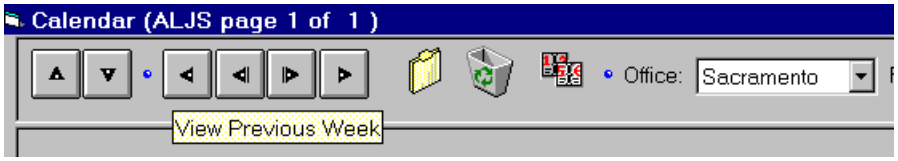


To change the calendar to another office, click on the arrow next to office, select another office.

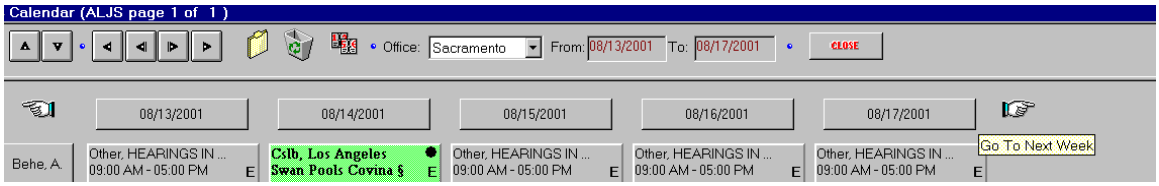


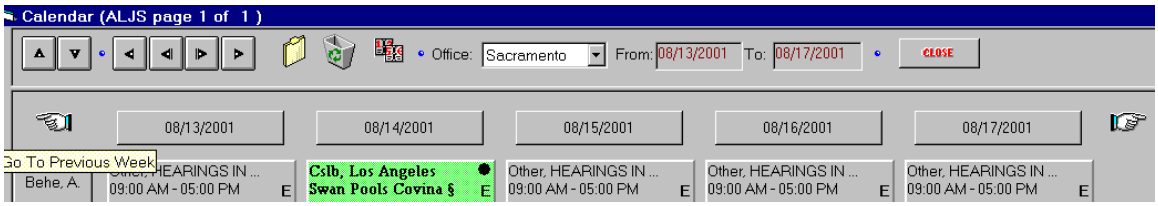
Calendar defaults to current week.

To show the next or previous week, click on one of the two middle arrows (left or right).

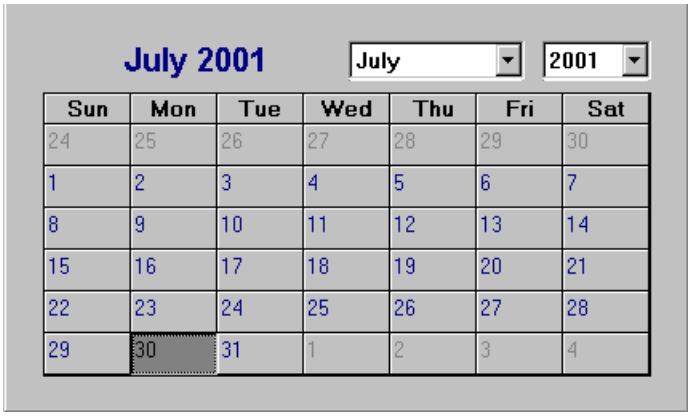


Another means of showing the next or previous week, click on the hand on either side of the date row.





If you need to go forward or back to another month and/or year, right click on one of the 4 right/left arrows and a calendar opens. You can change month, year and date. As soon as you click on the date, that particular calendar opens.



Calendar defaults to the ALJ calendar not the overset calendar.

Each Case card shows:

Agency
City
Case Name
The § symbol is displayed at the end of the case name if the case has been noticed
The ● is displayed in the upper right corner indicating more than one case is set
An **E** is displayed in the lower right corner if an Event is set
An **L** is displayed in the lower right corner if Leave is entered from the ALJ timesheet
A **B** is displayed if both Leave and Events are set

There can be multiple cases, multiple leave and multiple events (all three) on a single ALJ on a single day.

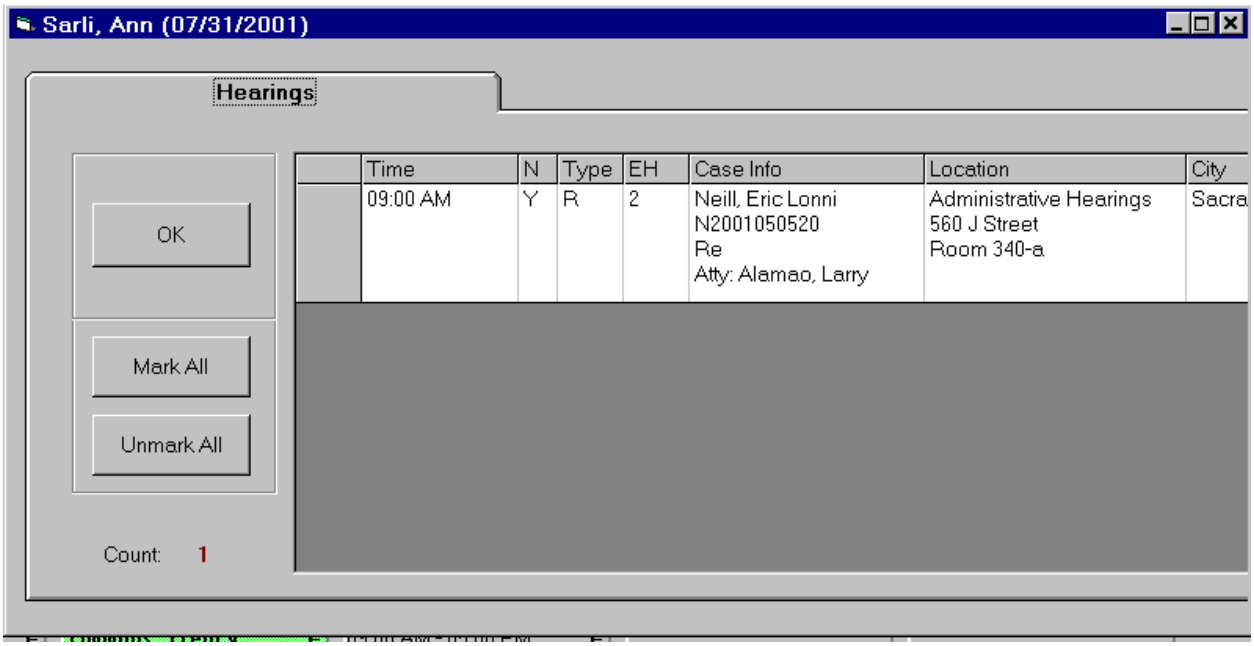
When a card is expanded (double click):

(If hearings are set) Hearings Screen Tab with all case details displayed.
(If an Event is set) Event Tab with the Event details displayed.
(If Leave is entered on the ALJ timesheet) Leave Tab with the Leave details displayed.

Each Case shows:

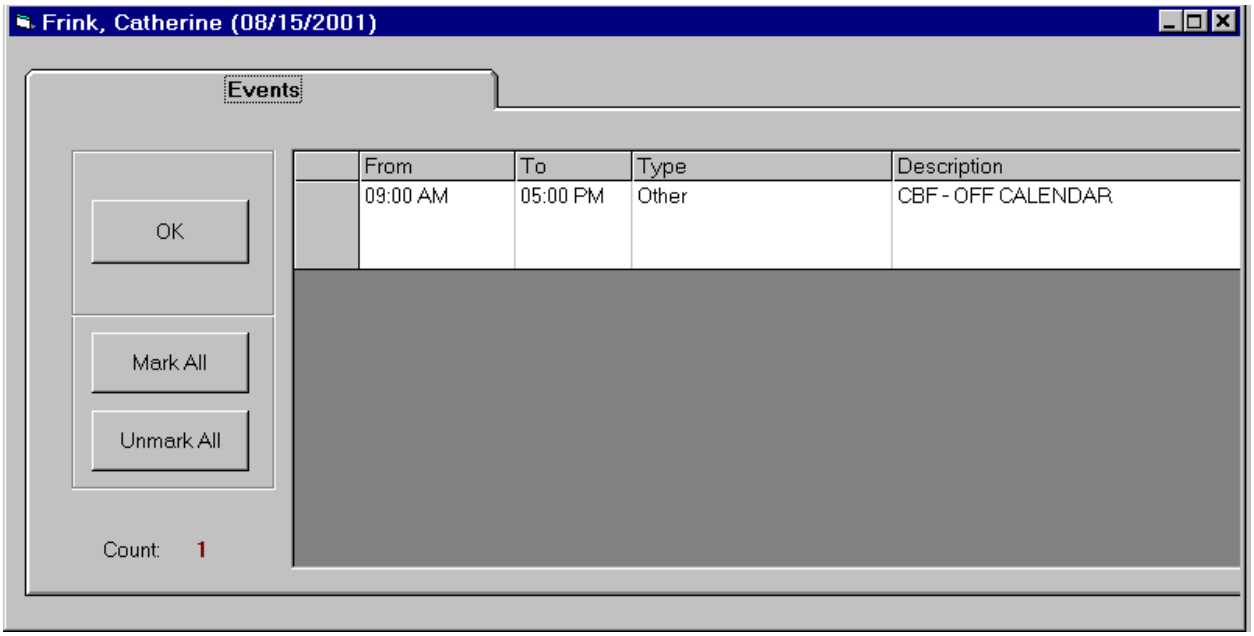
- Time
- Notice (Y or N)
- Hearing Type (R, P or S)
- Estimated Hours
- Case Info
    - Case Name
    - Case Number
    - Agency abbrieviation
    - Agency Attorney
- Location

    - Address
- City



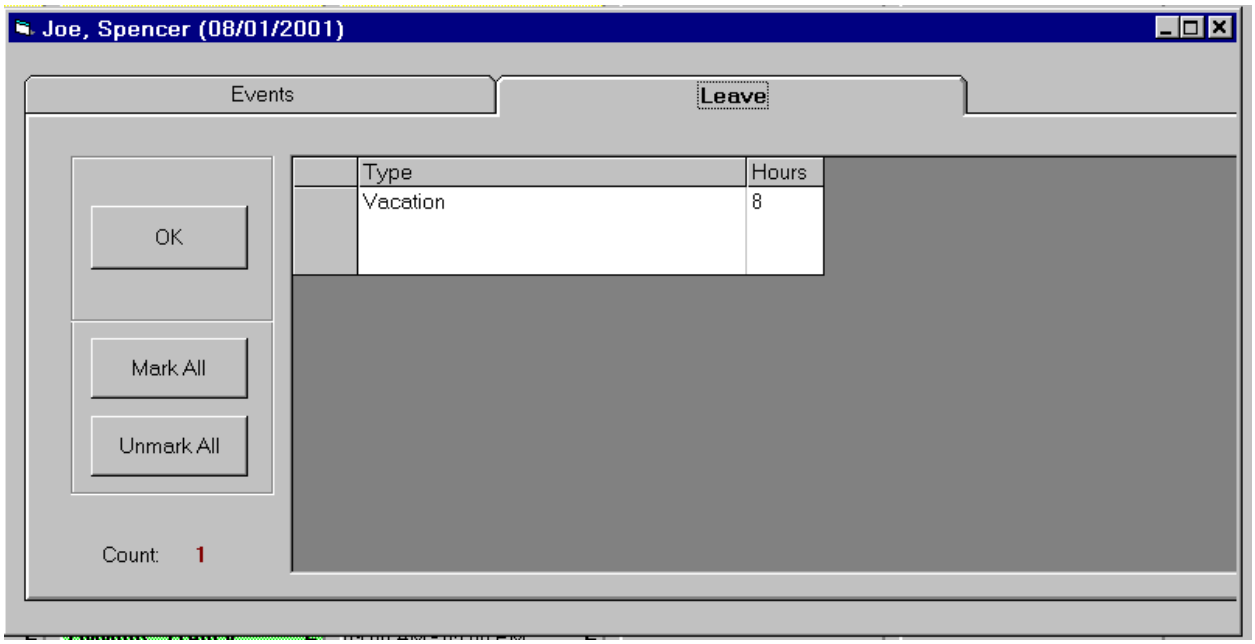
Each Event shows:

- Events show start and end time.
- Type
- Description



Each Leave shows (always in hours):

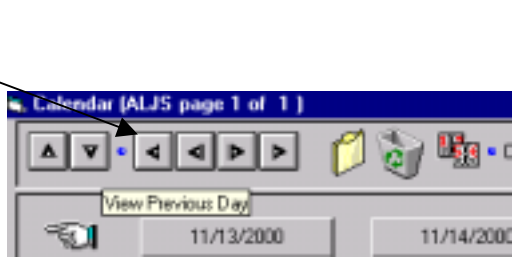
- Type
- Number of Hours



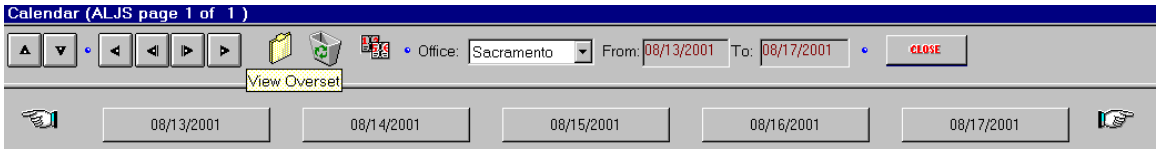
Current view is one week at a time for any given calendar.

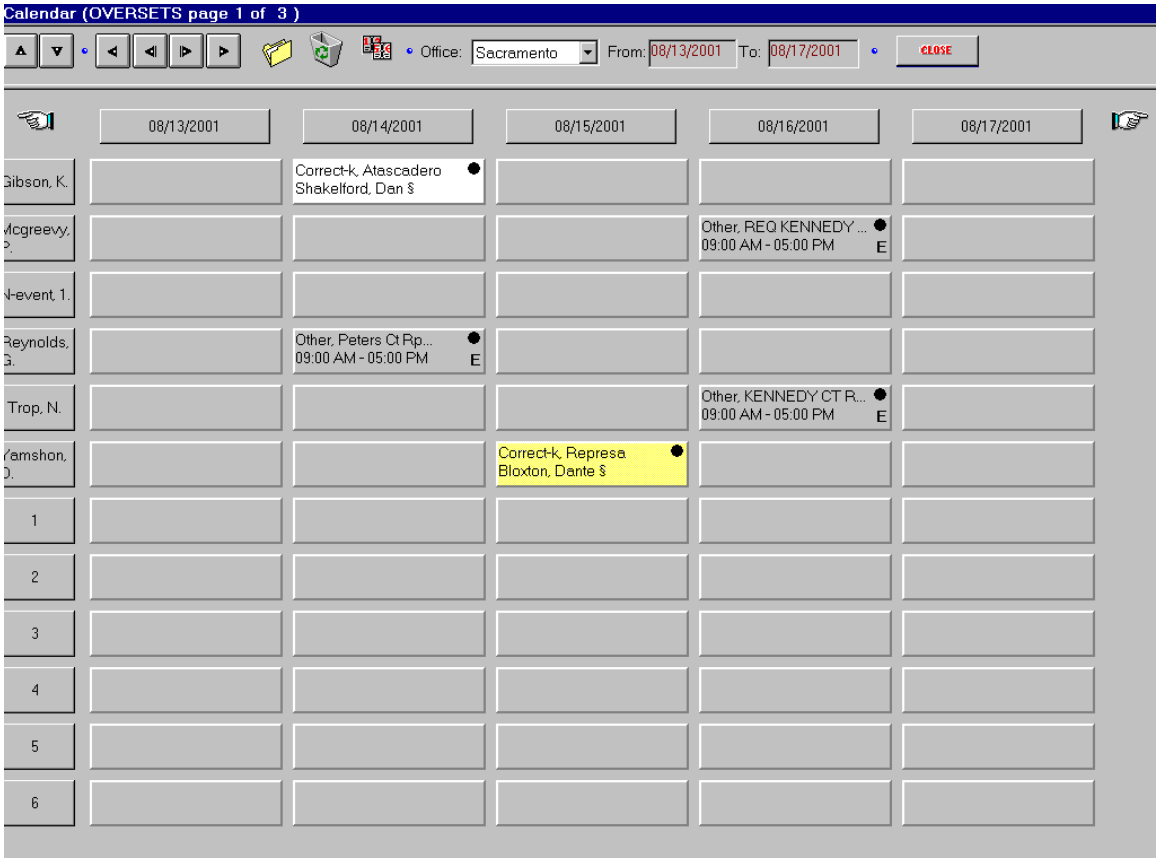
To view Saturdays and Sundays click on an arrow to view either the next day or the previous day. Depending on which one you select, you lose view of one of the regular business days.

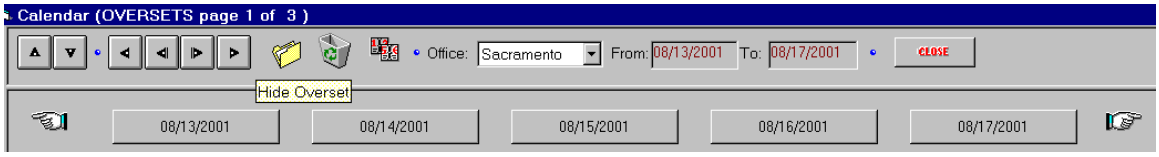
If a hearing is set on a weekend, the arrow for "View Previous Day" or "View Next Day" blinks. The left arrow blinks if it is Sunday; the right arrow blinks if it is Saturday.



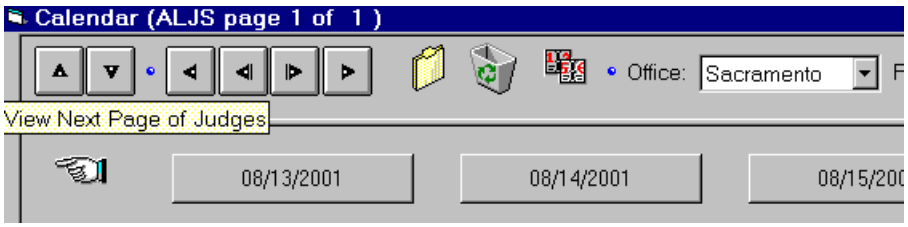
To toggle between the ALJs calendar and Oversets Click on the file folder.

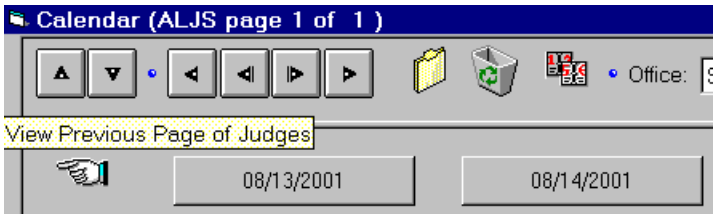




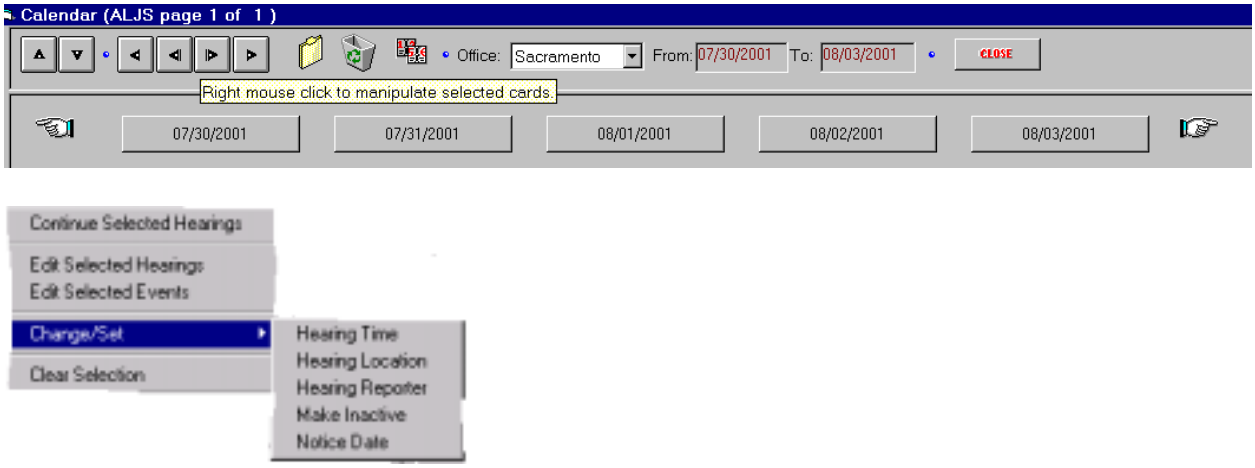


In those offices where there are more ALJs than can be viewed on one Click on the up or down arrow in the left corner of the screen.

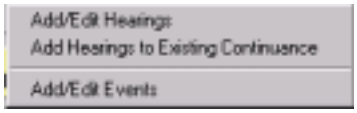




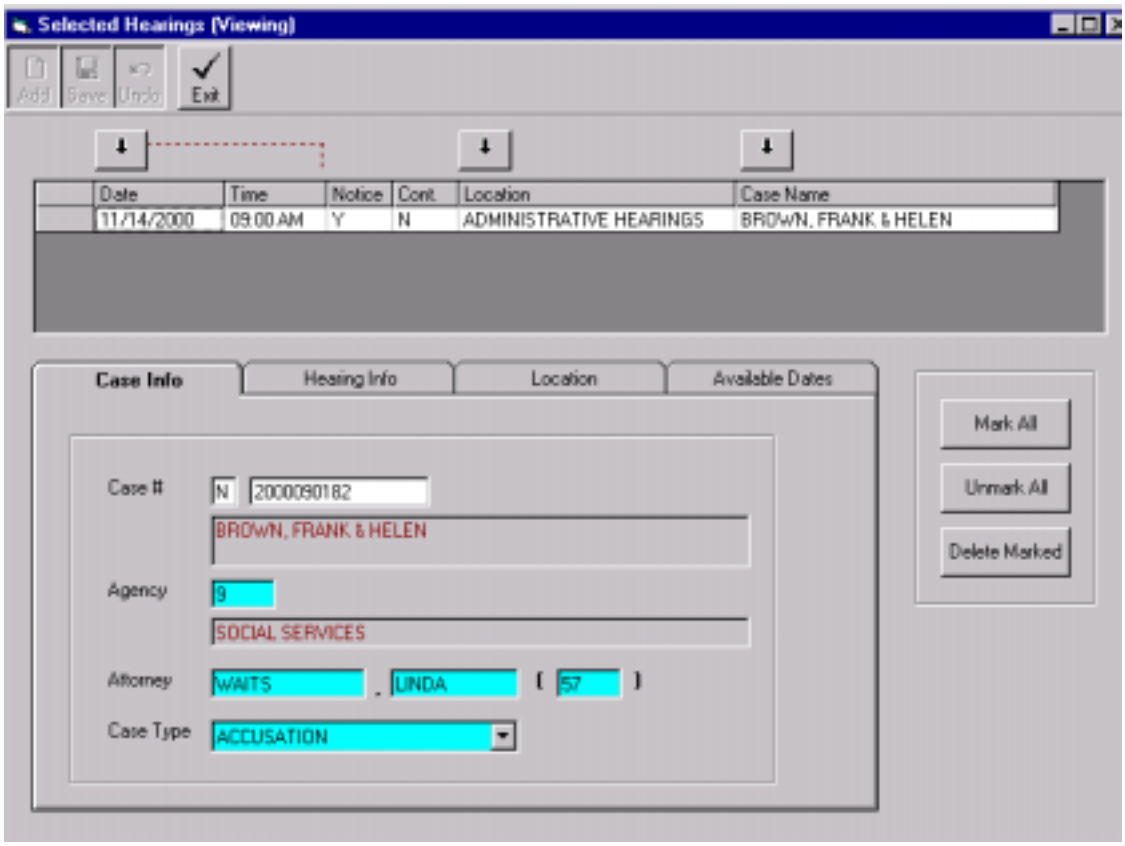
To edit, change or delete selected hearings, highlight a hearing (or hearings), right click on the trash can and the following menu appears.



Adding and editing hearings.



To add/edit selected hearings brings a form (similar to the one below): Case Info, Hearing Info, Location, Available Dates. You can also delete the hearing from this form (ALWAYS PROMPT WITH "ARE YOU SURE" ON DELETES). If you have selected a hearing, the form automatically fills in all of the fields related to that case/hearing. If you click a button/icon to ADD you get a blank form with a means of searching for the new case.



Fields that can be edited on the case form:

Case Info Tab		
Field Name	**Description**	**Field Type**
Case #	Case number (Division) + Case number.	Division char(1) Caseno varchar(10)
Agency	Agency ID	Int(4)
Attorney	Agency Attorney – lastname, firstname, attorney id.	Lastname varchar(20) Firstname varchar(20) Attorney id Int(4)

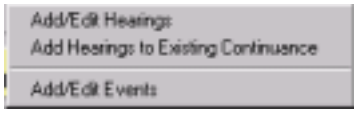
Case Type	Case Type Name (drop-down list)	Varchar(25)
Hearing Info Tab		
Scheduled date	Hearing scheduled date	Datetime(8)
Time	Hearing scheduled time	Datetime(8)
Haonly (ALJ Only)	Only one ALJ can be assigned to hearing?	Tinyint(1)
ALJ Scheduled	Scheduled ALJ	Int(4)
Notice Date	Date Notice of Hearing was sent.	Datetime(8)
Hours (estimated hours)	Estimated hearing hours	Decimal(5)
Reopened?	Reopened Case?	Tinyint(1)
Hearing Type	Type of hearing (Type of hearing, R, P, or S)	Tinyint(1)
Additional		Tinyint(1)
Active	Active Hearing	Tinyint(1)
Location Tab		
Location	Hearing Location	Varchar(30)
Address 1	Hearing location address line 1	Varchar(30)
Address 2	Hearing location address line 2	Varchar(30)
City	Hearing location city	varchar(30)
State	Hearing location state	Varchar(2)
Zip	Hearing location zip code	Varchar(10)
Available Dates Tab		
Hearing Date	First available hearing date for OAH	Datetime(8)
Agency Attorney	First available hearing date for Agency Attorney.	Datetime(8)
Respondent Attorney	First available hearing date for Respondent attorney.	Datetime(8)

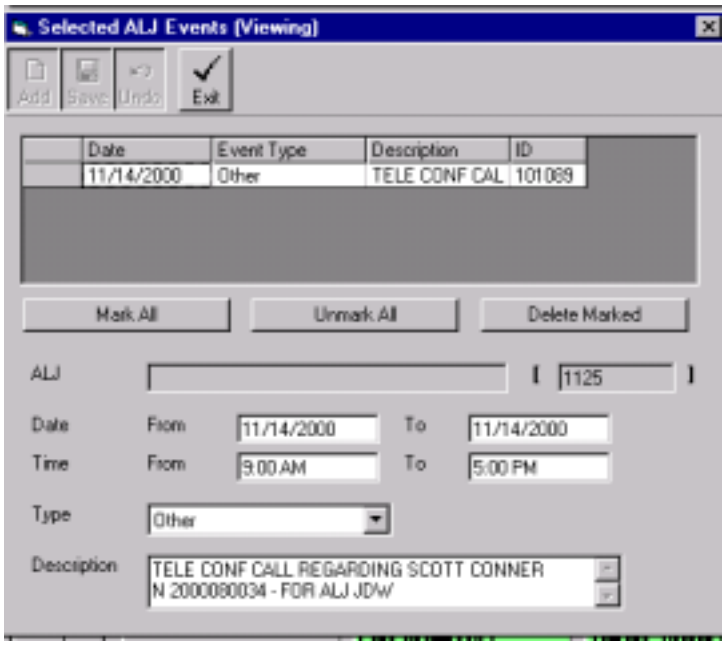
When marking a series of cases select one of the following. This way you can change one of these on all cases selected.

Hearing Time
Hearing Location
Hearing Reporter
Make Inactive
Notice Date

To edit selected events opens the form below. The Event can also be deleted from this form.

Adding an Event





All fields can be edited except ALJ.

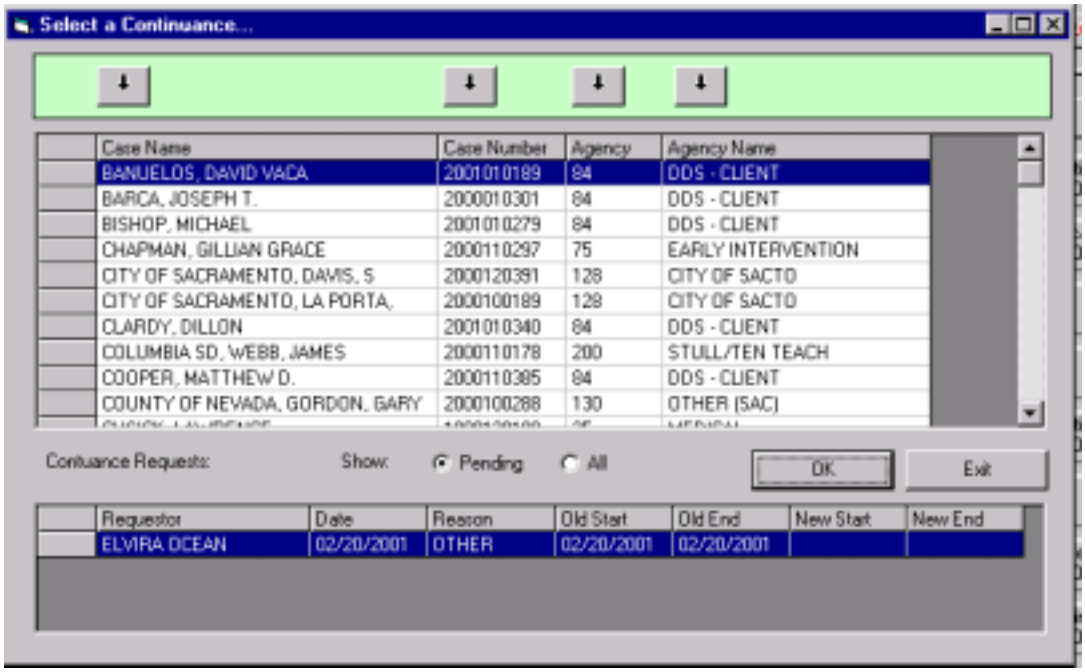
Field Name	Description	Field Type
From Date	Beginning event date	Datetime(8)
To Date	Ending event date	Datetime(8)
Type	Event Type	Varchar(40)
Description	Event Description	Varchar(100)

Continue Selected Hearings

This opens a form and a table of continuances. You can add this to an existing continuance or create a new one. You have to fill in specific information regarding the continuance, i.e. requester, etc. You can actually reschedule the dates now, or reschedule at a later date. When a continuance is checked "granted" it is removed from the currently scheduled dates on calendar.

To edit an existing continuance:

Click on the two calendars at the top of the screen next to the word "Office".
The following screen opens:



The list can be sorted by any of the columns.

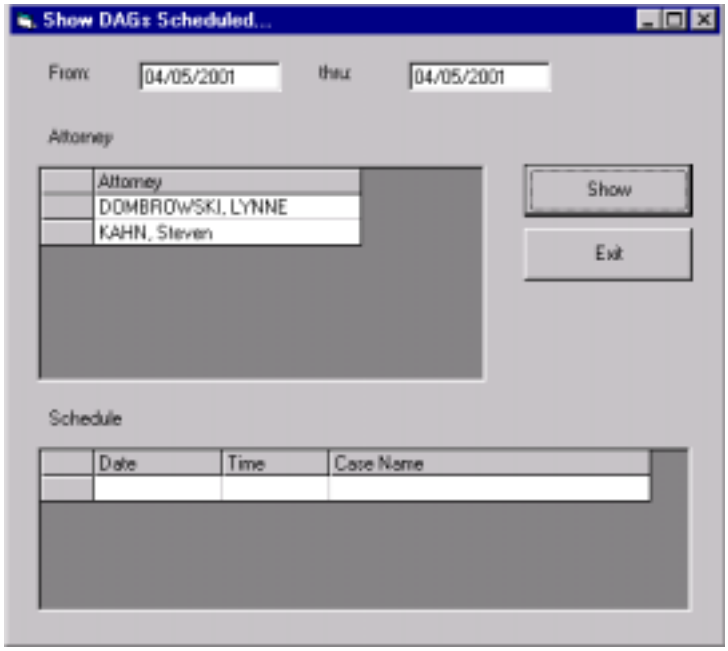
Either Pending or All continuances can be viewed. The set of continued hearings default to the current office calendar selected.

Pending Continuances are those with no new dates set.
All include those continuances with new dates set and the cases are not closed.

Show DAGs:

Right Click on a date will display a button: Show DAGs

Right click on any one of the date buttons opens the "Show DAGs menu. Left Click on the Show DAGs menu, opens the Show DAGs Scheduled Scheduled screen. Click on the Show button and all DAGs (Agency Attorneys) are displayed for that particular date:



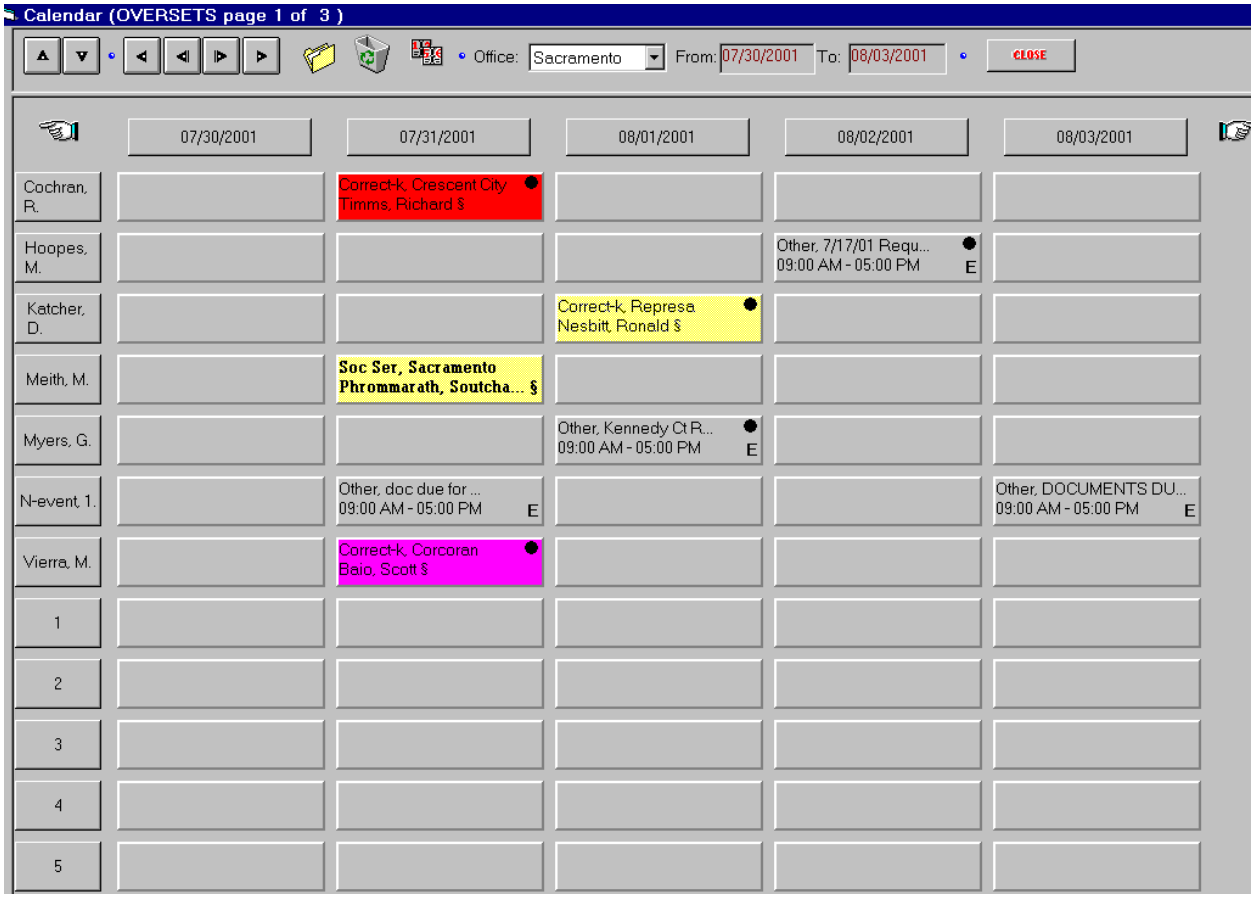
Oversets:

These are slots set aside for cases to be set. Each office has a specific number of overset cases because a percentage of the cases tend to either continue or settle. With additional cases set, the ALJs are more likely not to be idle on any given day. If the cases do not fall off, then cases can be assigned to Retired Annuitants, Protems or ALJs from other offices.

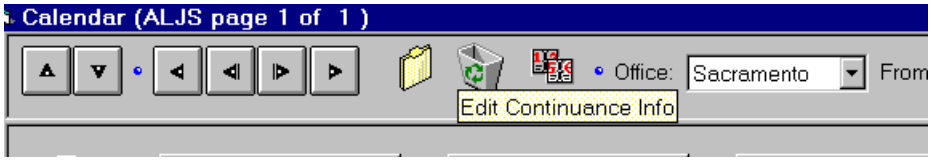
In order to set an event on overset without case numbers, a name needs to be added to the overset row.

Any case can be set on the overset rows with or without names.

Each office has a "bogus" ALJ, i.e. O-Event (for the Oakland Office), L-Event (for the LA Office), etc.



To Edit continuances, click on the calendar icon:



CONTINUANCES ON CALENDAR

New Continuance of Hearing and/or Hearings:

Description:

Continuance = changing the date of a hearing either to date(s) in the future or to date(s) prior to the original hearing date based on a continuance request from the parties. A hearing is continued only if a notice of hearing has been received by OAH. The continuance can be to the same number of days, to a lesser number of days, or to more days than the original set of hearing dates.

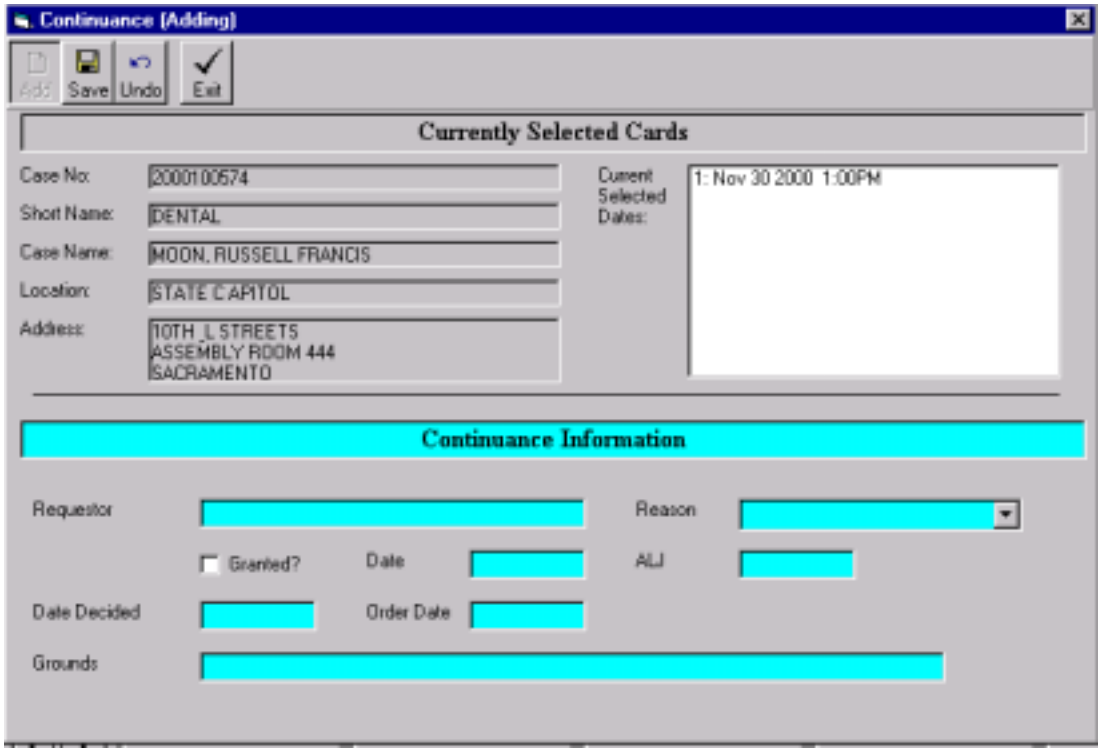
A party (agency or respondent) requests a continuance. This request is referred to the PJ (or his designee). It is either granted or denied.

Entries for a continuance are made at the time the ALJ has either granted or denied the request from the parties.

Once a hearing (or a series of hearings for a single case) has been selected, right click on the items, or click on a menu/icon for continuances.

A form opens showing all the active hearings for that case.

Fill in the information regarding the continuance, i.e. (see sample form below)

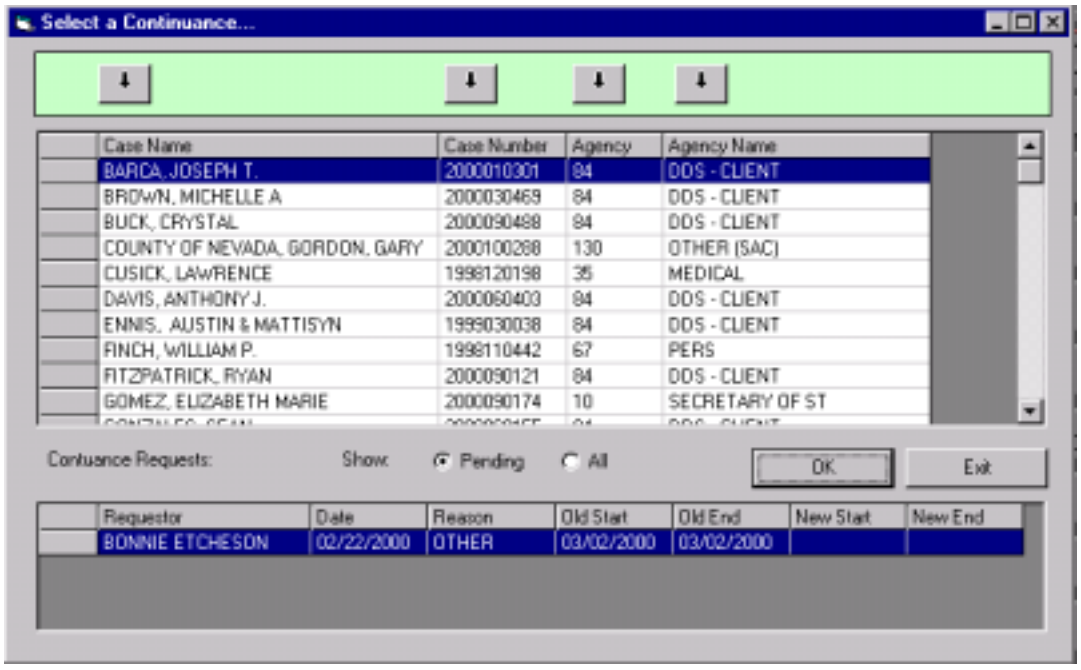


Field Name	Description	Field Type
Requestor	Person requesting the continuance.	Varchar(30)
Reason	Select from list of reason.	Int(4)
Granted	Click in Box - if continuance request has been granted.	Tinyint(1)
Date	Date Continuance has been granted.	Datetime(8)
ALJ	This is the name of the ALJ who has the request for continuance. (Normally this is referred to the PJ or his designee.)	Int(4) (Employee ID)
Date Decided	Date ALJ has granted or denied continuance request.	Datetime(8)
Order Date	Date of Order granting or denying continuance request.	Datetime(8)

The new dates may not be specified at the time of the above entries. The new hearing dates may be completed at another time.

Save.

Editing Continuance Information:

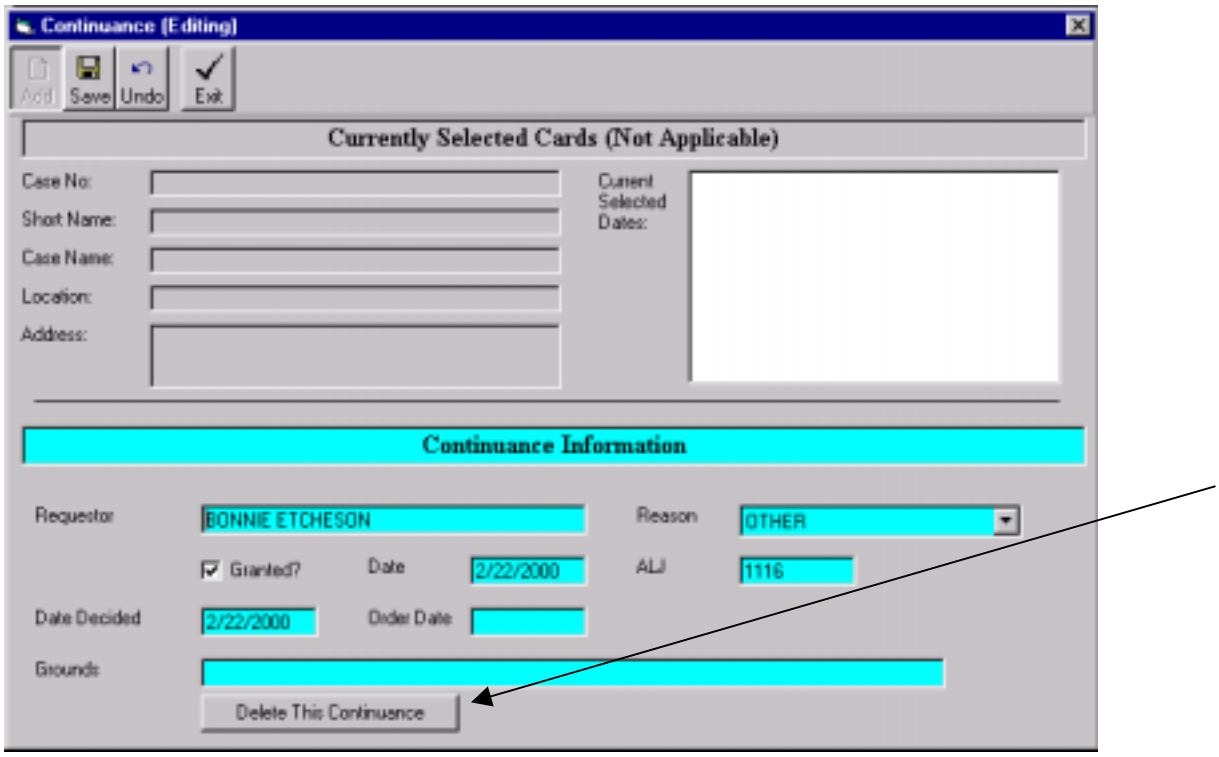


This list defaults to "**Pending** continuances". These are continuances without continued "TO" dates.

NOTE: If a continuance has been requested, not marked granted (which means it was denied), it would appear in the "**All** continuances" list. The "**All** continuances" list is a list of <u>all</u> the

continuances requested on all hearings whether the continuances have been granted or denied. This list can be sorted by Case Name, Case Number, Agency or Agency Name by clicking on the arrow above each of the columns.

Double Click the case you wish to edit information on. Complete the information.



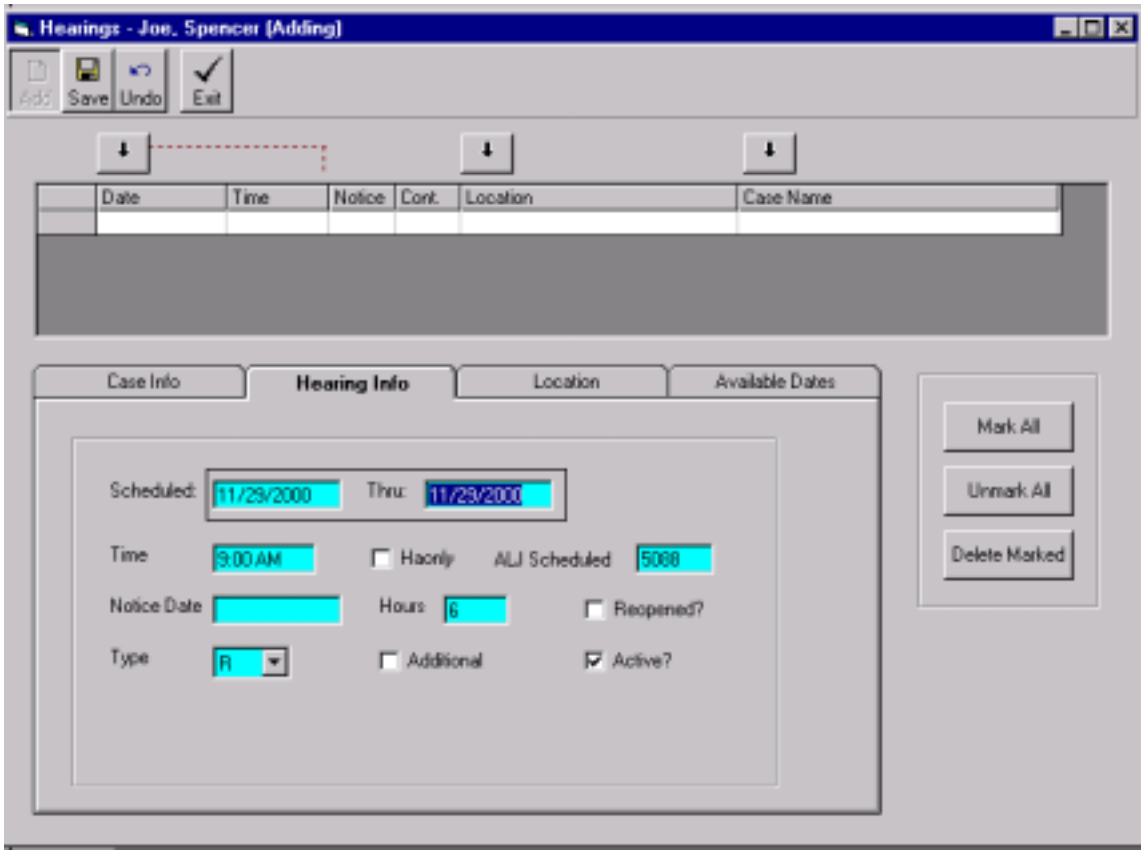
Save.

NOTE: A Continuance can be deleted from this form also.

To change the dates, you must click at least the first date to which you wish to continue the case, then right click. The following form appears. Fill in the necessary information, i.e. ending date of hearing, and revised time and location.

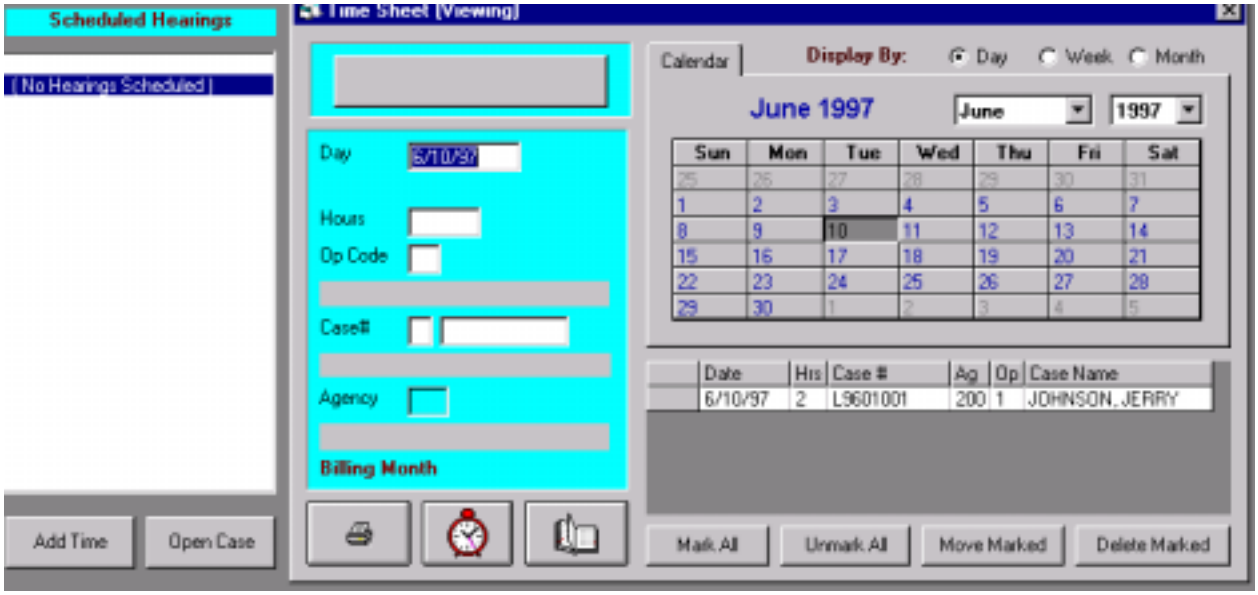
Save.

The case now appears on the new dates.



NOTE: If a case is continued to more days than the initial requested days, this does not constitute "Additional" days. All days are "Continued". (SEE Add/Edit hearings for field descriptions).

Time Sheet

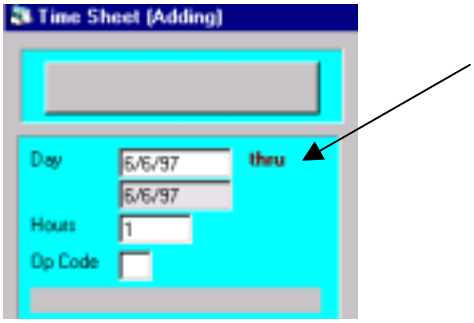


General Information:

- Currently, ALJs are setup to have their timesheet open when CaseManagement opens.
- There are two "views" of the timesheet which can only be set by the Administrator
  View One: Timesheet opens to current date. This is the default.
  View Two: Timesheet opens to last entry.
- Scheduled Hearings reflects anything posted on the calendar for the ALJ timesheet opened.
- Billing Cutoff for ALJ entry for any given month is 11:59 p.m. on the 5th of the month Any entries made after the 5th of the month will be billed in the next month.
- Any entries made in any of the previous months will be billed in the current billing month.

- The "TOTAL HOURS:" reflected on the bottom status bar, is the total number of hours entered for the month (day, or week) selected. This is unrelated to the total number of billable or nonbillable hours for this billing month.

Day: This has to be selected from the calendar. The date cannot be typed in the box
When you enter a number in the hours box, the date box changes:



This allows you to put a series of dates in provided they all will have the same Op Code and number of hours, etc.

Hours: This has to be entered in no less than half hour increments.

Op Code: Billable Op Codes. These codes **require** case numbers to be entered.

5	Allocated Time
42	Calendar (billable)
3	Decision Time
1	Hearing Preparation
2	Hearing Time
48	Heather
12	Law & Motion
46	Mediation
13	Medical Board Training
43	Misc (billable)
6	Pre-Hearing Conference
15	Settlement
14	Transcript
4	Travel (billable)

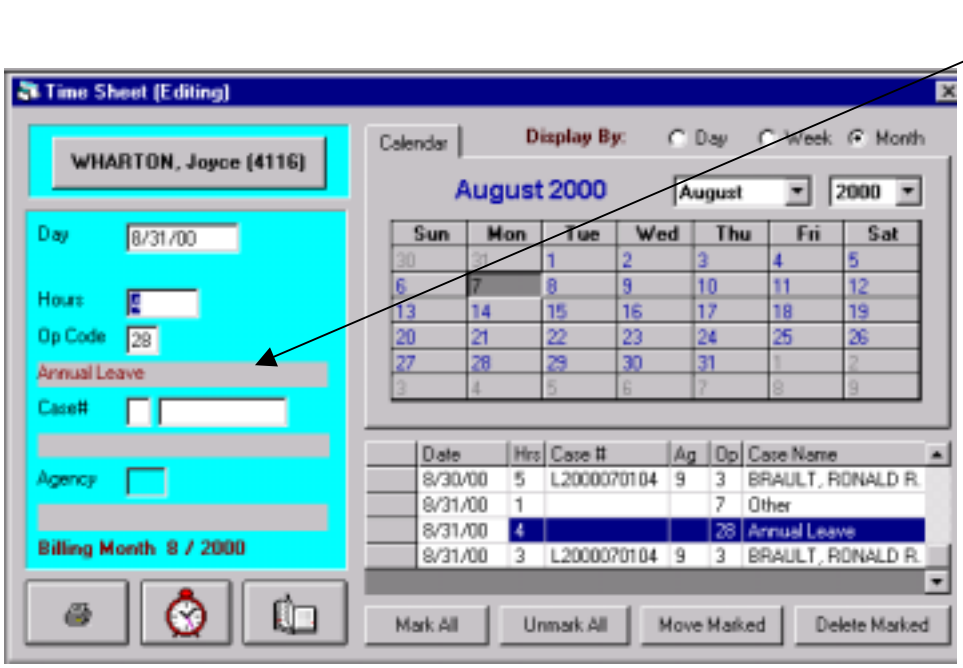
Nonbillable Op Codes.

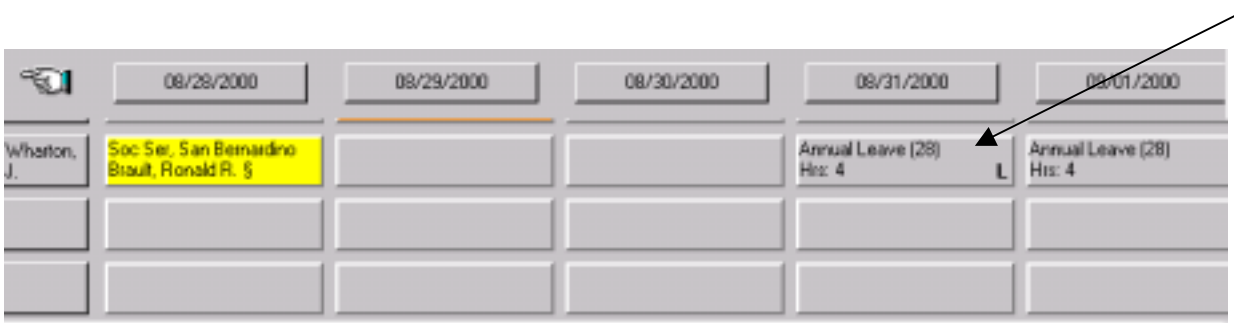
1. Nonbillable "Excuse" Codes. These are personal leave options, i.e. vacation, sick leave, jury duty, etc.

28	Annual Leave
40	AWOL
29	Bereavement Leave
20	Holiday
39	Industrial Injury
21	Jury Duty
22	Leave
37	Non-Industrial Injury

23	Other-634
35	Paid Educational Leave
36	Short Term Military Leave
24	Sick Leave
27	Sick Leave - Death in Family
26	Sick Leave - Family
41	Subpoenaed Witness
38	Temporary Disability
32	Using Excess Hours
31	Using Holiday Credit
30	Using OT Credit
33	Using Personal Holiday
34	Using Saturday Holiday
25	Vacation

When an Excuse Code is entered, (i.e. annual leave), it updates the calendar.



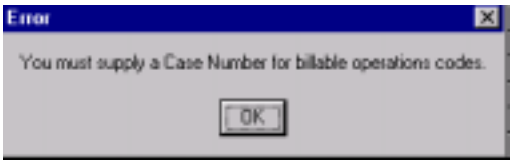


2. Nonbillable Op Codes do not require case numbers. The system will allow you enter a case number, but will not save it.

9	Administration
8	Calendar (non-billable)
47	Keyhea (Nonbillable)
7	Other
11	Supervision
10	Training
45	Transcript (non-billable)
44	Travel (non-billable)

Usually the "required" case number is indicated by either the letter "N" or "L" remaining in the case number box when you enter an op code. The exception to this is when you enter op code 13 (Medical Board Training). The "N" or "L" will remain, but no case number is entered.

If you enter either an "invalid" case number or enter no case number at all when one is required, you will receive the following message.



Case#: The case number can be typed in.

You can double click on a case on your calendar and it will fill in the case number, etc.

You can double click on a case in the top grid and it will fill in the case number, etc.

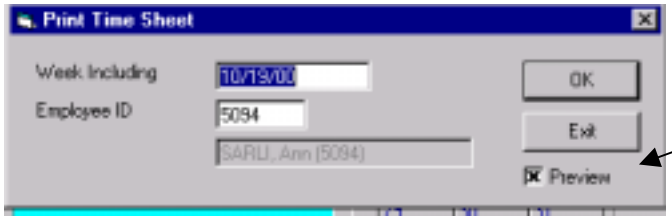
Either the letter "N" or the letter "L" will be automatically filled in the case number based on login name. The letter can be changed.

Agency: autofills when case number is entered.

Billing Month: This is the actual billing month (1st day of month, through the 5th of the following month when hours are entered). Entry in any future month will be billed that month. Any entries in previous months will be billed in the month that the entry is actually made.

Three utility buttons facilitate the following:

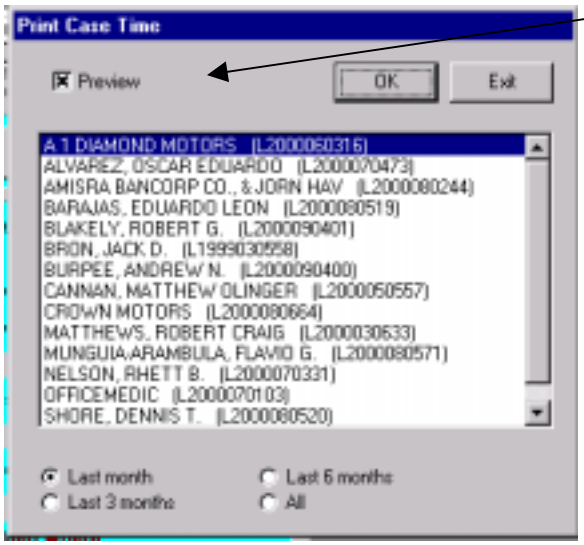
Clicking on the printer allows viewing or printing the timesheet for a selected week:



Preview allows you to view time sheet. Removing the x from preview allows you to just print.

Clicking on the clock allows you to select any past cases you have billed and view or print the total amount of time you have entered for that case.

You can view Last month, Last 3 months, Last 6 months or all cases. These appear in alpha order.



Preview allows you to view time sheet. Removing the x from preview allows you to just print.

Double clicking on a case will either give you a view (if you have preview marked) or print out the case time.

Office of Administrative Hearings
Case Time Report

AHLER, James
A 1 DIAMOND MOTORS (L2000060316)

Hearing Prep Hours	0.0
Actual Hearing Hours	0.0
Decision	0.0
Travel	3.5
Law & Motion	0.5
Allocated Time	4.0
Pre-Hearing Time	0.0
Settlement Time	0.0
Calendar	0.0
Misc	0.0
Total Hours	**8.0**

Clicking on the book will allow you to view or print your calendar for those days selected.

Preview allows you to view time sheet. Removing the x from preview allows you to just print.

Clicking "OK" will either give you a preview (if preview is marked) or print the calendar for those days selected.

Calendar Report
Office of Administrative Hearings

Hearing Dates: 10/3/00 To 10/3/00
Office: Sacramento Office Printed: 10/19/00

Hearing Date: 10/3/00

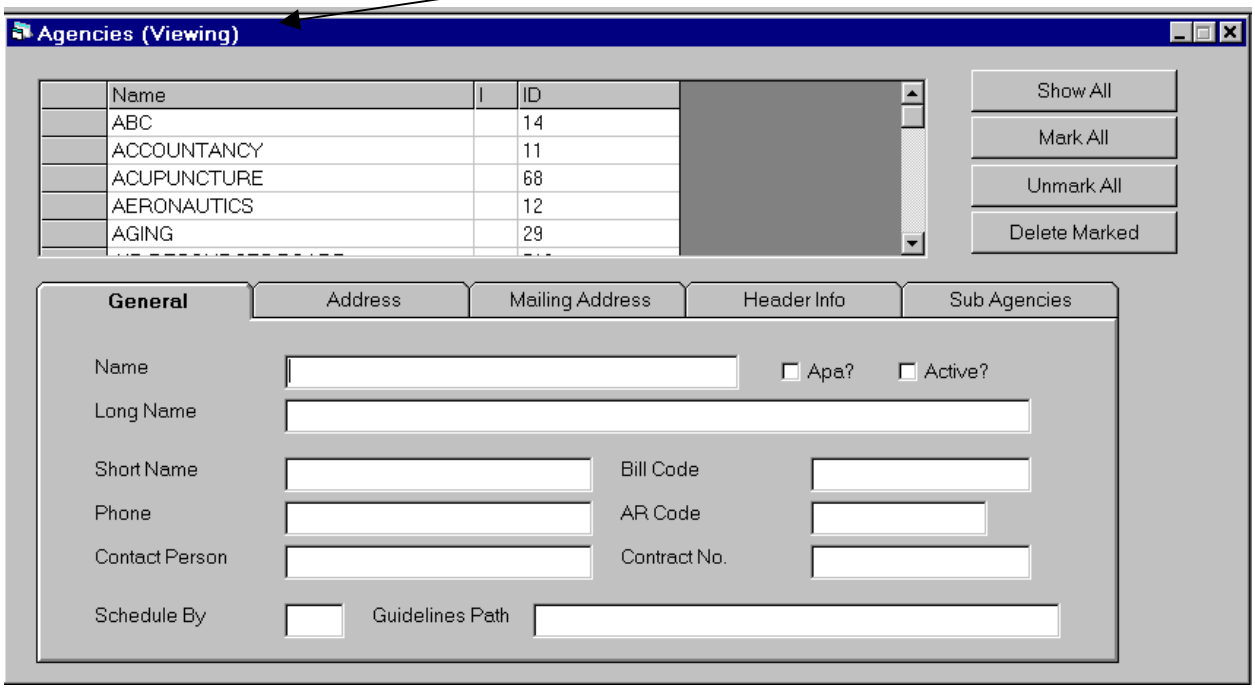
10:30	NELSON, RHETT B. MEDICAL L2000070331 - 09-1999-94895 MSC AT OAH , CA	35	24.00 L	JA

Subtotal for this Hearing Date: 1

ADMINISTRATIVE TOOLS
TABLES – PART 1

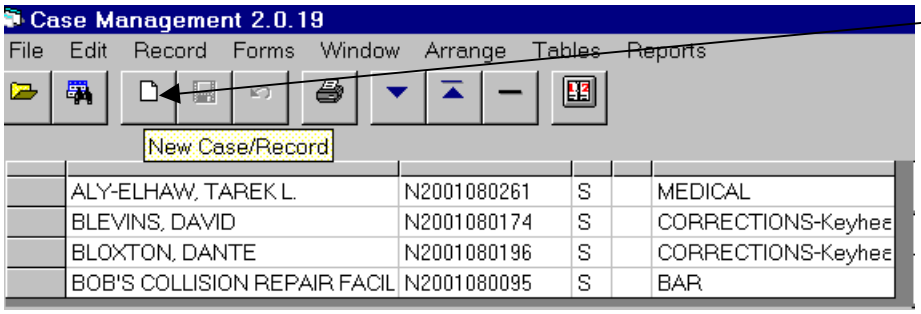
Changes to Adding or Editing

AGENCIES:



To ADD a new agency:

Start typing in the Name field. The mode changes to "Adding" instead of "Viewing" mode, or Click on the menu bar.



Name = The "Name" should be fairly short (15 to 18 characters, including spaces) since it appears on the agency pick list. The maximum number of characters allowed is 30, but the whole name is not viewable after it is selected. Type name in uppercase

APA and Active automatically are marked.

APA = Agencies who are mandated to use OAH or Agencies who choose to use OAH and abide by the APA rules. Mark box if APA. Unmark box if not APA.

Active = Currently active Agency. Mark box if Active. Unmark box if not Active.

Long Name = A more descriptive name, including both the department and unit name, i.e.:

CORRECTIONS, DEPT. OF, HEALTH CARE SERVICES DIVISION

TOXIC SUSBTANCE CONTROL, CERTIFIED UNITED PROGRAM AGENCIES

Type Long Name in uppercase.

Short Name = Abbreviated name (10 characters, including spaces):

CSLB
TOXIC-CUPA
CORR-HCSDIV

Type Short Name in uppercase.

Bill Code = DGS 5 digit billing code. This is entered preceded by a "0" (zero) as a placeholder for future expansion. The billing code is a required entry.

Phone = Not required. Should be typed in this format: 916-445-4926

AR Code = Defaults to 1610. This can be changed as needed to one of the following.

1610 = State Agency
1620 = Local Agency
1640 = Stull Agency (200) only

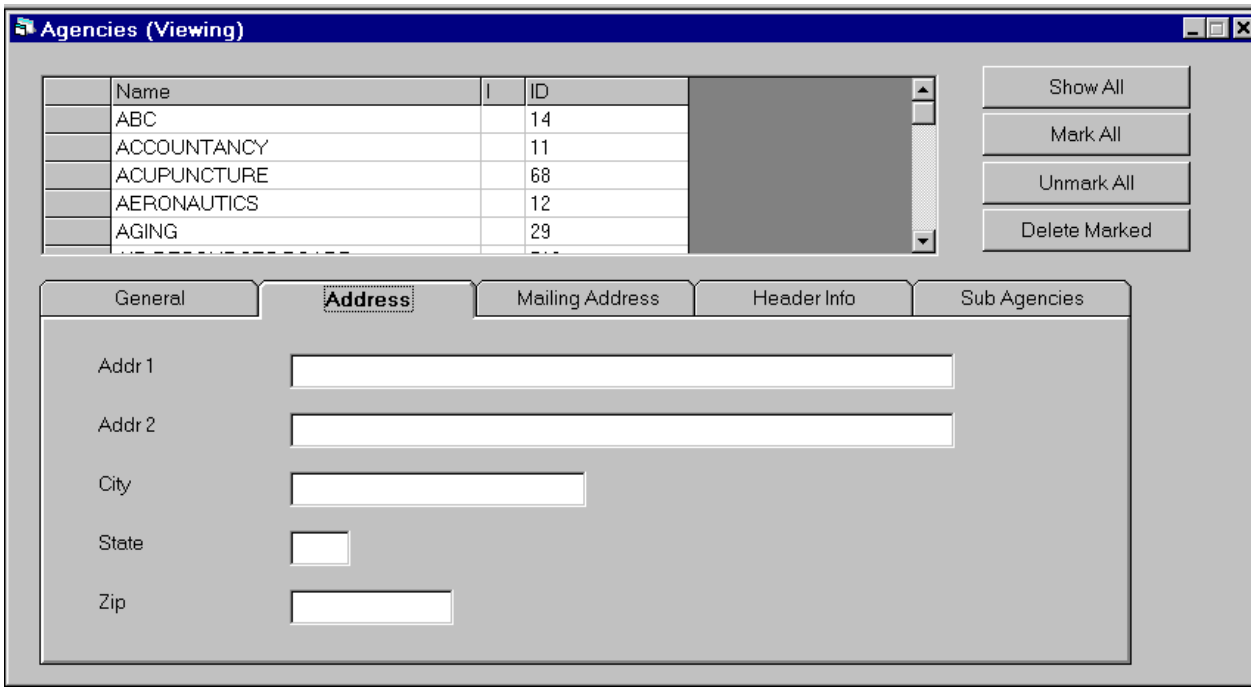
Contact Person = Not required. Could be Director, Accounting person, etc.

Contract No. = Not required. This only applies when contract has been prepared for nonAPA agencies.

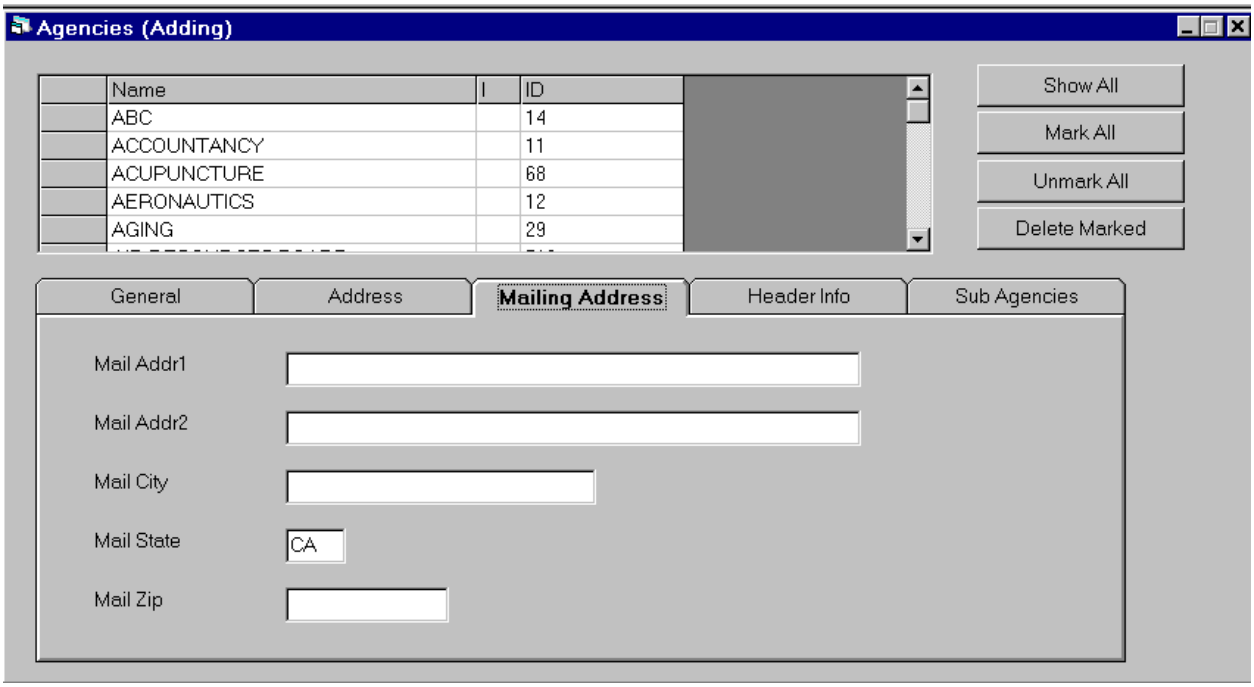
Schedule By = Defaults to 30 days. This is the usual timeframe. It isn't being used at this time.

Guidelines Path = This field is currently has no purpose.

Address Tab:



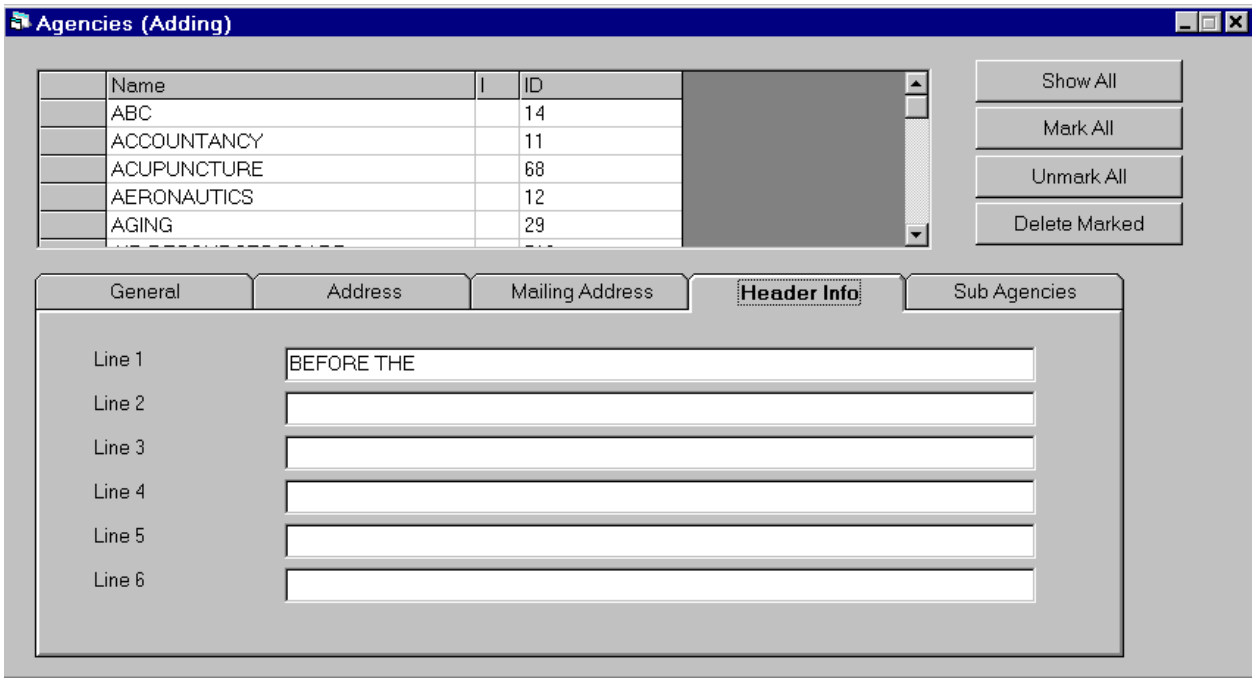
Mailing Address Tab:



These two tabs pretty much could contain the same information. Initially the Address Tab was to contain the address for accounting purposes. The Mailing Address tab was added for the purpose of preparing labels to the agency directors, etc. Neither tab is being fully utilized.

Header Info Tab:

Enter (all in uppercase) the header information for the Proposed Decision, Dismissal, etc***. BEFORE THE*** is the standard first line. Usually the Agency's official name is entered on the second line, i.e. DEPARTMENT OF CORPORATIONS, DEPARTMENT OF REAL ESTATE, ect. The last line is always STATE OF CALIFORNIA. It is not necessary to use all 6 lines.

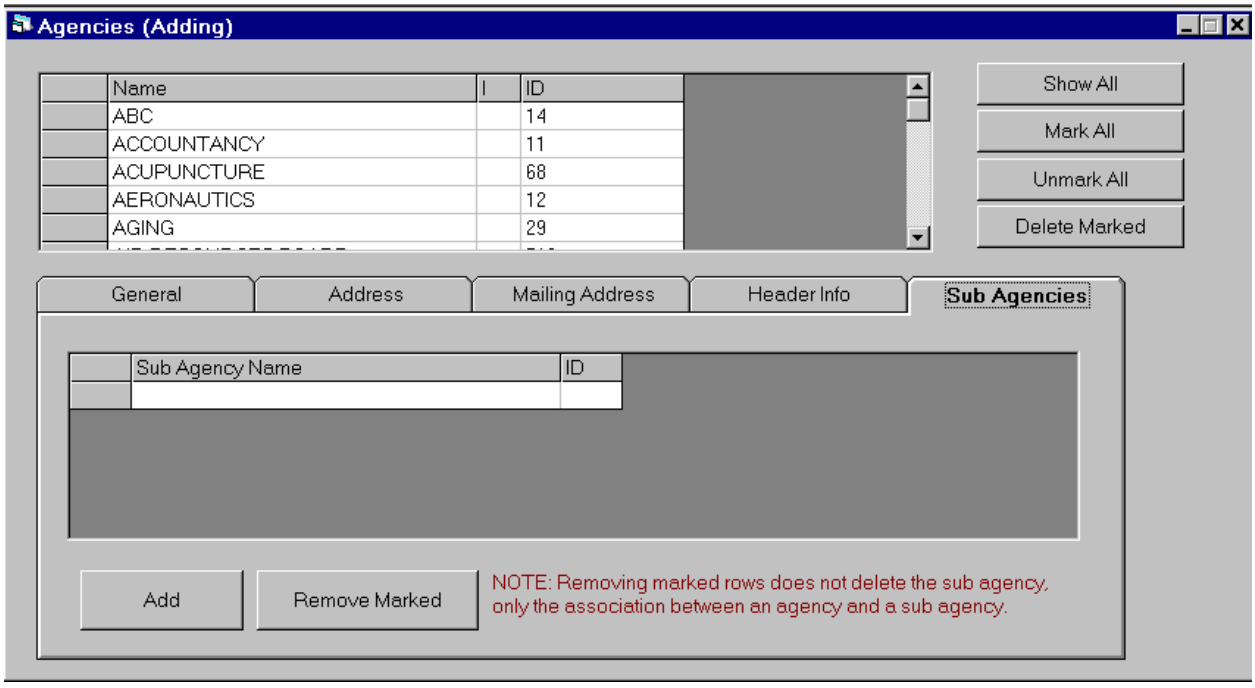


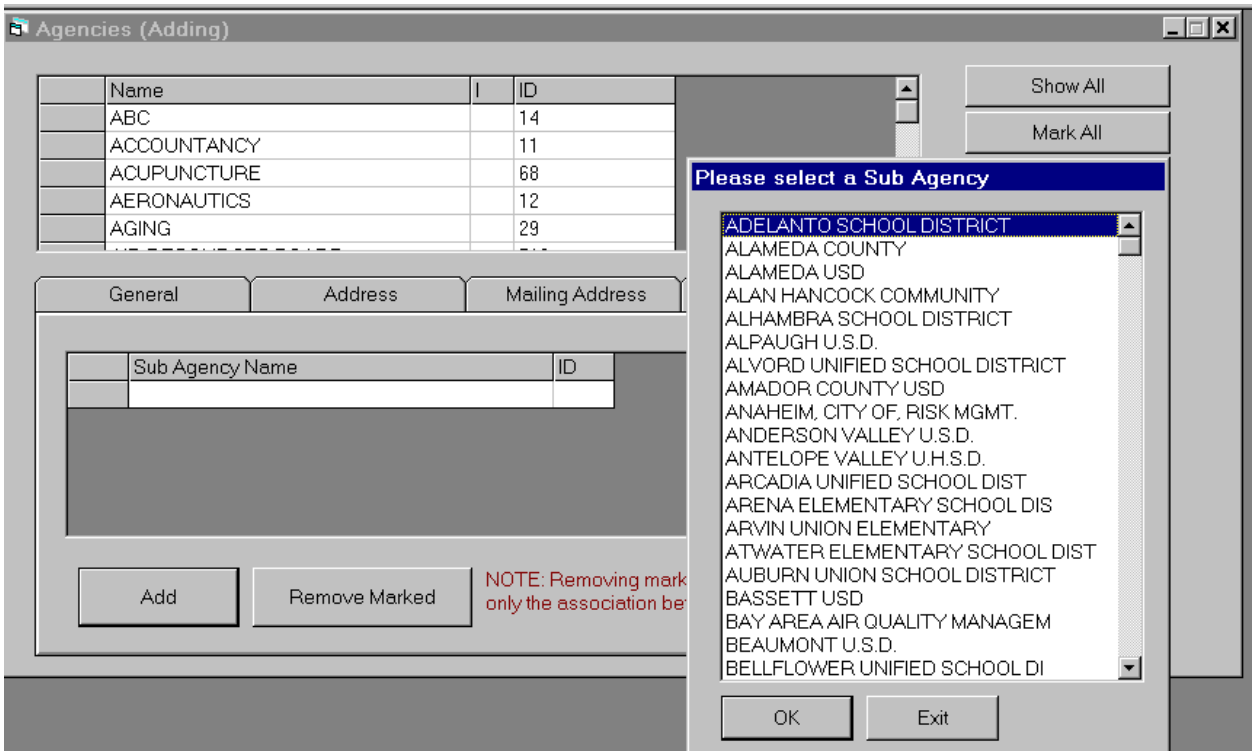
SubAgencies Tab

Click Add Button to retrieve a list of SubAgencies. When you find the agency, double click on the agency or click ok after you have highlighted the agency. You can only add one agency at a time.

If you cannot find an agency, contact the OAH Accounting Section.

If you have added a SubAgency incorrectly, highlight it, Click Remove Button.





To Save, Click Record, Click Save, or Click Disk on toolbar.

ATTORNEY:

<u>To ADD a new attorney:</u>

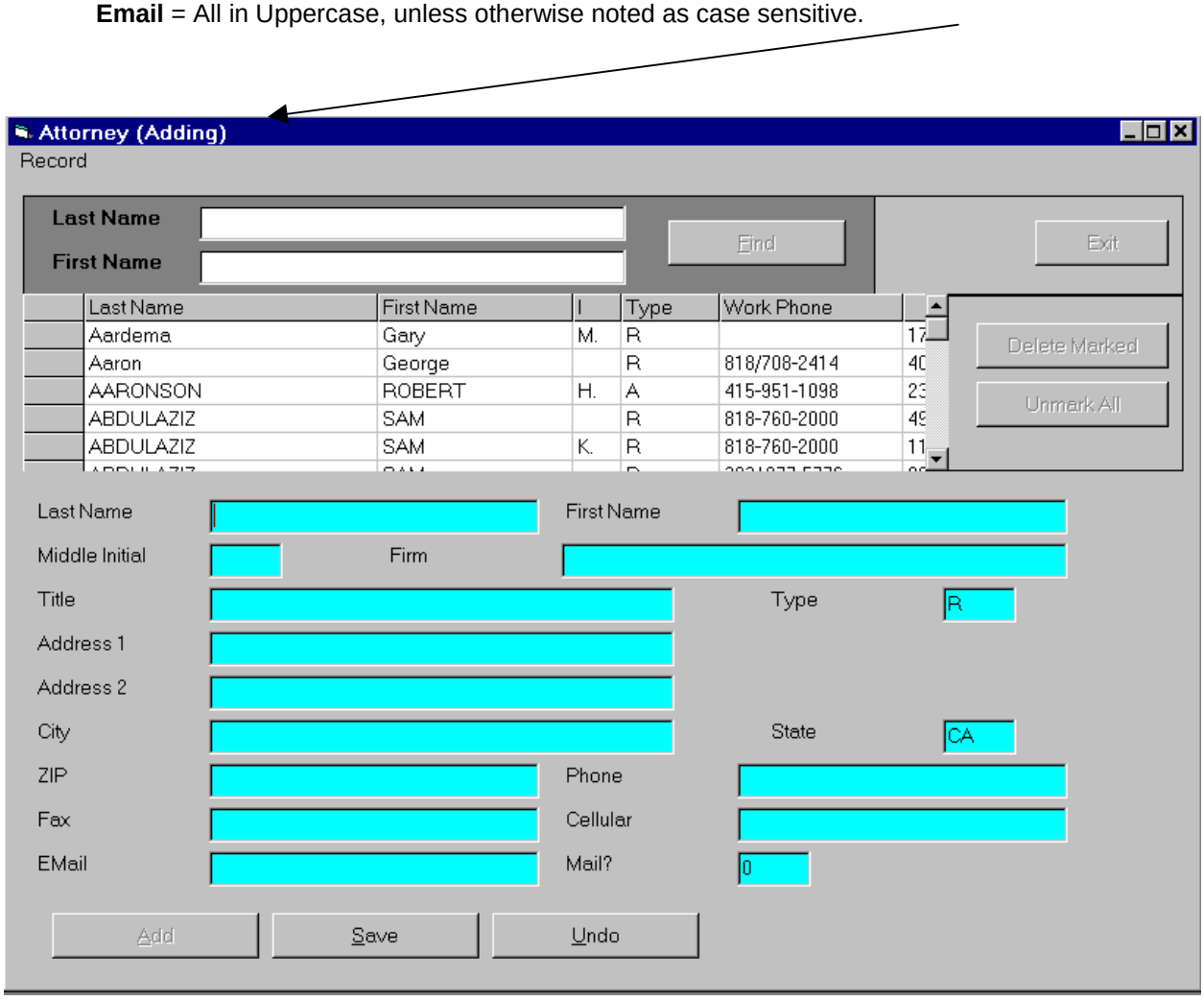
Click Add Button or Hold Ctrl A. You will see (Adding) appear on the Attorney Form, instead of (Viewing).

It is best to add <u>all</u> the information in uppercase.

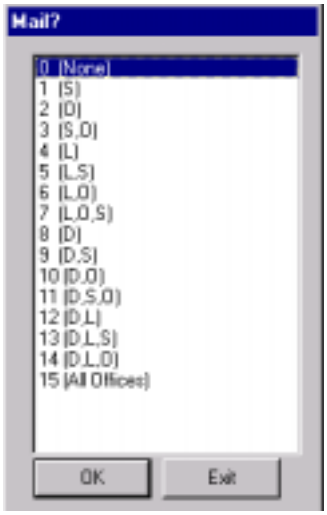
Last Name = All in Uppercase
First Name = All in Uppercase
Middle Initial = All in Uppercase
Firm Name = All in Uppercase
Title = All in Uppercase
Type = Click in the box. Enter R (Respondent Attorney) or A (Agency Attorney).
NOTE: When you double click in the box, R Regular appears. This should be R (Respondent Attorney or A (Agency Attorney) as choices. THIS IS A BUG.
Address 1 = All in Uppercase
Address2 = All in Uppercase
City = All in Uppercase
State = Defaults to CA
Zip = Either 5 digit number or 5 digit number hyphen 4 digit extension (95814-3838)

Phone = Number should be written: Area Code hyphen Prefix hyphen Telephone Number, i.e., 415-213-3737

Fax = Number should be written: Area Code hyphen Prefix hyphen Telephone Number, i.e., 415-213-3737
Cellular = Number should be written: 445-3939
Email = All in Uppercase, unless otherwise noted as case sensitive.



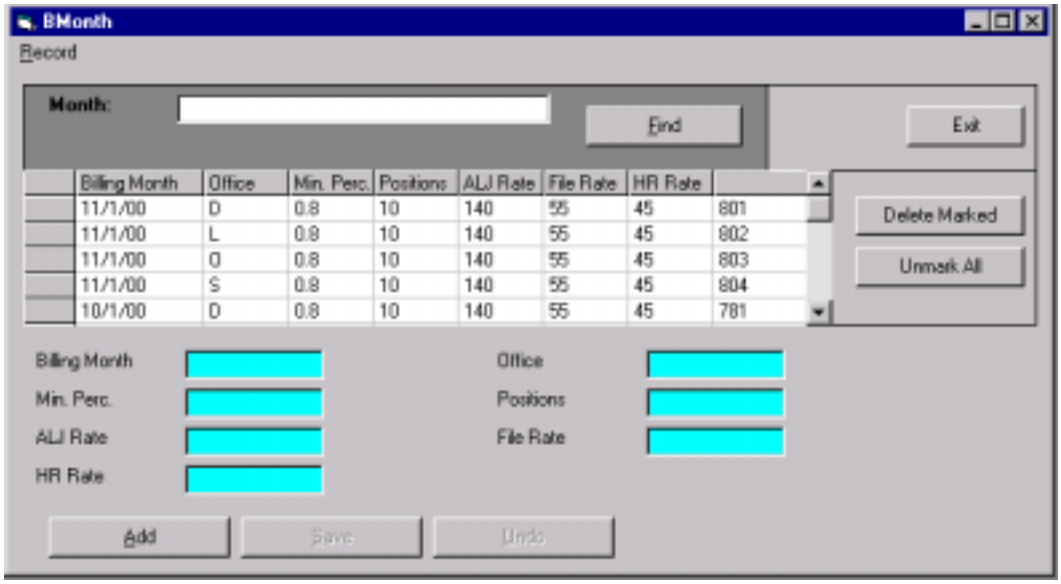
Mail? = Double Click in the Box. The following list appears: This is used to designate which office the attorney will be used by. If you don't know if other offices use this Attorney, then only designate the office you do know.



0	None	(No Office)
1	(S)	Sacramento
2	(O)	Oakland
3	(S, O)	Sacramento and Oakland
4	(L)	Los Angeles
5	(L, S)	Los Angeles and Sacramento
6	(L, O)	Los Angeles and Oakland
7	(L, O, S)	Los Angeles, Oakland and Sacramento)
8	(D)	San Diego
9	(D, S)	San Diego and Sacramento
10	(D, O)	San Diego and Oakland
11	(D, S, O)	San Diego, Sacramento and Oakland
12	(D, L)	San Diego and Los Angeles)
13	(D, L, S)	San Diego, Los Angeles and Sacramento)
14	(D, L, O)	San Diego, Los Angeles and Oakland
15	(All Offices)	Sacramento, Los Angeles, San Diego and Oakland

Save Record.

BILLING MONTH:



Currently Billing Month is updated via a scheduled task on the SQL Server to run a stored procedure. It is not likely that a billing month will need to be added.

Editing billing months usually only entails changing the following fields. For a specific billing month, each of these would have to be changed for each office. The rates currently apply to all offices.

OFFICES

D = San Diego
L = Los Angeles
O = Oakland
S = Sacramento

ALJ Rate = Administrative Law Judge hourly billing rate. (This usually only changes at the beginning of a new fiscal year, i.e. July 1.)

HR Rate = OAH Court Reporter hourly billing rate. (This usually only changes at the beginning of a new fiscal year, i.e. July 1.)

File Rate = Case Filing Fee. For each case opened, the Agency is charged a flat filing fee. (This usually only changes at the beginning of a new fiscal year, i.e. July 1.)

ADMINISTRATIVE TOOLS
TABLES
Part 2

CASE TYPE:

Case Type ID	Case Type Name	Description	Agency
42	10-RESIDENTIAL PLACEMENT	Residential Placement	DDS (84) EARLY START (75)
54	11-INDEP LIV SKILLS TRAin	Independent Living Skills Training	DDS (84) EARLY START (75)
56	12-SPEECH THERAPY	Speech Therapy	DDS (84) EARLY START (75)
57	13-DAY CARE/COST ISSUES	Day Care Services and/or Parent's Cost Issues	DDS (84) EARLY START (75)
58	14-AUTISM	Issues related to Autism (i.e., treatment and services, parent services, parent as vendor, parent coordinator, workshops for parents or tutors)	DDS (84) EARLY START (75)
59	15-PARENT VENDORIZATION	Parent Vendorization	DDS (84) EARLY START (75)
60	16-REIMBURSEMENT	Reimbursement	DDS (84) EARLY START (75)
61	17-AVAIL SERVICE PROVIDER	Available Service Provider	DDS (84) EARLY START (75)
62	18-MEDICAID WAIVER	Medicaid Waiver	DDS (84) EARLY START (75)
63	19-COMPLIANCE MATTERS	Compliance Matters	DDS (84) EARLY START (75)
35	1-ELIGIBILITY	Eligibility for regional center services	DDS (84) EARLY START (75)
36	2-RESPITE	Respite care	DDS (84) EARLY START (75)
37	3-TRANSPORTATION	Transportation issues	DDS (84) EARLY START (75)
38	4-GENERIC RESOURCES	Availability of alternative funding source	DDS (84) EARLY START (75)
39	5-SPEC/ADAPT EQUIP/SUPP	Special or Adaptive Equipment or Supplies (e.g., diapers, wheelchairs, wheel chair ramps or lifts, hearing aids)	DDS (84) EARLY START (75)
43	6-OT/PT	Ocupational Therapy or Physical Therapy	DDS (84) EARLY START (75)
55	7-PROGRAMS	Consumer Day Program, Workshops, Extended Year Programs, Social Recreation Programs	DDS (84) EARLY START (75)
40	8-SPECIAL LEGAL ISSUES	Legal Issues, (e.g., rights of consumers, aid paid-pending	DDS (84) EARLY START (75)
41	9-OTHER SERVICES	Other services not listed	DDS (84) EARLY START (75)
2	ACC/CIT	Accusation/Citation	ALL AGENCIES EXCEPT: DDS (84) EARLY START (75) SOCIAL SERVICES (9)
3	ACC/S OF I	Accusation/Statement of Issues	SOCIAL SERVICES (9) FORESTRY (39) REAL ESTATE (47) SPCB (54) TEACHER CRED (58) SMOG CHECK (61)
1	ACCUSATION	Accusation	PRIVATE INVEST (6) SOCIAL SERVICES 9) SECRETARY OF STATE (10)

Case Type ID	Case Type Name	Description	Agency
			ACCOUNTANCY 11) ARCHITECT (15) BARBER BD/COSMETOLOGY (16) CHIRO EXAM (18) ENGINEERS (19) CSLB (21) CORPORATIONS (23) DENTAL BD (24) CONSERVATION (25) FUNERAL DIRECTOR (28) PSYCHOLOGY (30) HORSE RACING BD (31) INSURANCE ((32) INDUSTRIAL RELATIONS (33) PODIATRIC MEDICINE (34) MEDICAL BD (35) BAR (36) DMV (38) FORESTRY (39) RN (40) OPTOMETRY BD (41) OSTEOPATHIC BD (42) PHARMACY BD (44) INVESTIGATIVE SERV (45) REAL ESTATE (47) SHORTHAND RPTRS (49) REPAIR SERVICES (51) BEHAVIORAL SCIENCE (53) SPCB (54) VET MEDICINE (55) VOC NURSE (56) PSYCH TECH (57) TEACHER CRED (58) FPPC (59) HEARING AID (60) SMOG CHECK (61) PHYSICIAN ASST (63) RESPIRATORY CARE (64) REAL ESTATE APPR. (65) ACUPUNCTURE (68) PHYSICAL THER (69) IND MED COUNCIL (79) HOUSING & COMM DEV (81) BOATING/WATERWAYS (88) ALCOHOL & DRUG-LICENSEES (101) EMERGENCY MEDICAL SERV. (103) CC DISAB RET (144) STULL/TEN TEACH (200) PESTICIDE REGULATIONS (503) CEMETERY BD (507) FINANCIAL INSTITUTION (513) OPTICIAN-REGISTERED DISPENSING (522) MANAGED HEALTH CARE (526)
5	**ADA**	Average Daily Attendance	SOCIAL SERVICES (9) TEACHER LAYOFFS (169)
52	**ADMINISTRATIVE COMPLAINT**	Administrative Complaint	INTEGRATED WASTE MGMT (102)
6	**APPEAL**	Appeal	BARBER BD/COSMETOLOGY (16) CORPORATIONS (23) EDUCATION (26) HORSE RACING BD (31) BAR (36) REAL ESTATE (47) SMOG CHECK (61) REHAB (71) FOOD NUTRITION (72)

Case Type ID	Case Type Name	Description	Agency
			DDS-CARE PROVIDER (80) DDS-AUDIT APPEALS (86) OTHER (SAC) (130) CITY/COUNTY (140) SPEC ED INTERAGENCY DISPUTE (502)
7	**APPLICATION**	Application	PRIV., POSTSEC. & VOC. ED. (504) FINANCIAL INSTIITUTION (513)
8	**AUDIT/APPEAL**	Audit Appeal	EDUCATION (26) DMV (38) FOOD NUTRITION (72) DDS (86) EDUCATION AUDIT PANEL (524)
9	**CITATION**	Citation	SOCIAL SERVICES 9) ACCOUNTANCY 11) BARBER BD/COSMETOLOGY (16) ENGINEERS (19) COLLECTION AGNCY (20) CSLB (21) DENTAL BD (24) PSYCHOLOGY (30) PODIATRIC MEDICINE (34) MEDICAL BD (35) BAR (36) RN (40) OPTOMETRY BD (41) PHARMACY BD (44) INVESTIGATIVE SERV (45) REAL ESTATE (47) SHORTHAND RPTRS (49) REPAIR SERVICES (51) BEHAVIORAL SCIENCE (53) VET MEDICINE (55) VOC NURSE (56) SMOG CHECK (61) REAL ESTATE APPR. (65) PHYSICAL THERAPY (69) DDS-CARE PROVIDER (80) HOME FURNISHING & THERMAL 506)
51	**DESIST AND REFRAIN**	Desist and Refrain	CORPORATIONS (23) REAL ESTATE (47)
33	**DETERMINATION**	Determination	SF RETIREMENT (146)
12	**DISAB/IND**	Disability Industrial	CHIRO EXAM (18) SMOG CHECK (61) PERS (67) CITY/COUNTY (LA) (140) OTHER SF (150)
13	**DISAB/RET**	Disability Retirement	PERS (67) CITY OF SACTO (128) OTHER (SAC) (130) CITY/COUNTY (LA) (140) SF RETIREMENT (146) OTHER SF (150)
31	**DISMISSAL**	Dismissal	OTHER (SAC) (130) CCMERIT BD (145) CLASS EMP (151) COMM COLL-CAUSE (152) STULL/TEN TEACH (200)
49	**ENFORCEMENT ORDER**	Enforcement Order	TOXIC (4)
44	**INVOLUNTARY MEDICATION**	Involuntary Medication	CORRECTIONS-KEYHEA (90) CYA (527)
15	**ISO**	Interim Suspension Order	SOCIAL SERVICES 9) CSLB (21) DENTAL BD (24)

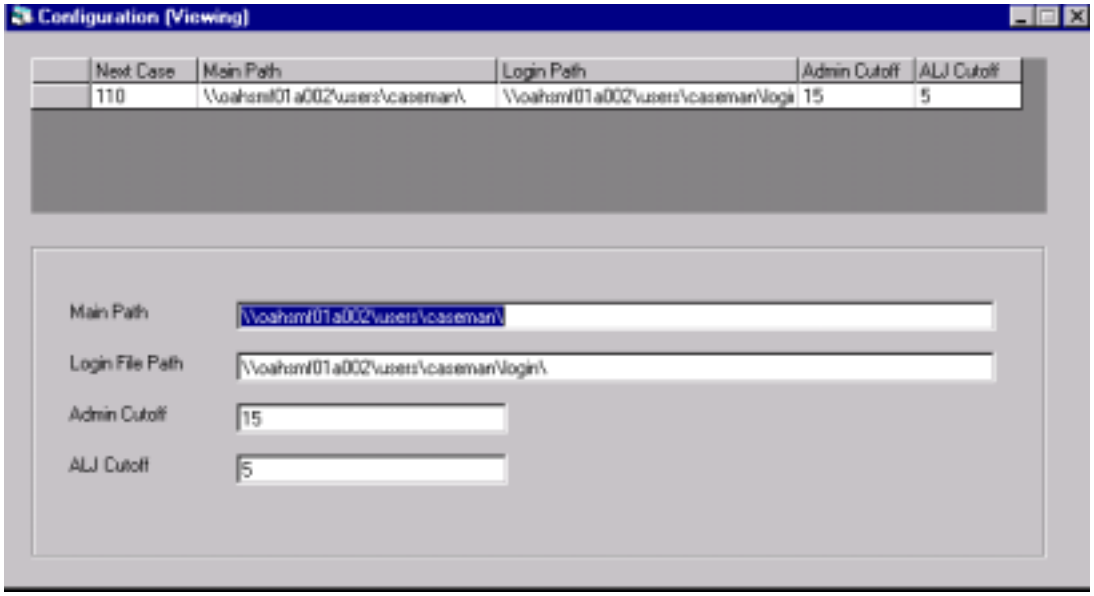
Case Type ID	Case Type Name	Description	Agency
			MEDICAL BD (35) BAR (36) RN (40) OSTEOPATHIC BD (42) PHARMACY BD (44) VOC NURSE (56) SMOG CHECK (61) PHYSICIAN ASST (63) RESPIRATORY CARE (64) CEMETERY BD (507) SPCH LANG PATH & AUDIO (517)
53	**MEDIATION**	Mediation	FORESTRY (39) PERS (67) DDS (84) EARLY START (75)
16	**OTHER**	Other – No case type available	ALL AGENCIES EXCEPT: DDS (84) EARLY START (75) CORRECTIONS-KEYHEA (90)
17	**PERS/DISAB**	PERS – Disability	PERS (67) SF RETIREMENT (146)
18	**PERS/RET**	PERS Retirement	PERS (67) SF RETIREMENT (146)
20	**PET/ACC**	Petition/Accusation	SOCIAL SERVICES 9) DENTAL BD (24) CONSERVATION (25) PODIATRIC MEDICINE (34) MEDICAL BD (35) BAR (36) DMV (38) RN (40) OPTOMETRY BD (41) SPCB (54) SMOG CHECK (61) PHYSICIAN ASST (63) RESPIRATORY CARE (64)
21	**PET/PROB**	Petition Probation	ACCOUNTANCY 11) CHIRO EXAM (18) ENGINEERS (19) DENTAL BD (24) PSYCHOLOGY (30) MEDICAL BD (35) RN (40) OPTOMETRY BD (41) OSTEOPATHIC BD (42) PHARMACY BD (44) BEHAVIORAL SCIENCE (53) VOC NURSE (56) PSYCH TECH (57) RESPIRATORY CARE (64) PHYSICAL THERAPY (69) EMERGENCY MEDICAL SERV. (103)
22	**PET/PROT**	Petition Protest	MEDICAL BOARD (35) BEHAVIORAL SCIENCE (53) RESPIRATORY CARE (64)
23	**PET/REINST**	Petition Reinstatement	ACCOUNTANCY 11) CHIRO EXAM (18) ENGINEERS (19) DENTAL BD (24) PSYCHOLOGY (30) MEDICAL BD (35) DMV (38) RN (40) OPTOMETRY BD (41)

Case Type ID	Case Type Name	Description	Agency
			PHARMACY BD (44) BEHAVIORAL SCIENCE (53) SPCB (54) VET MEDICINE (55) VOC NURSE (56) PSYCH TECH (57) PHYSICIAN ASST (63) ACUPUNCTURE (68)
19	PETITION	Petition	CHIRO EXAM (18) DENTAL BD (24) PSYCHOLOGY (30) HORSE RACING BD (31) MEDICAL BD (35) DMV (38) BEHAVIORAL SCIENCE (53) VOC NURSE (56)
50	PETITION OF APPEAL	Petition of Appeal	
47	PETITION/RED OF PENALTY	Petition/ Reduction of Penalty	CHIRO EXAM (18) RN (40) PHARMACY BD (44) REAL ESTATE (47) PHYSICAL THER (69)
24	PROB/CAUSE	Probation for Cause	TEACHER LAYOFFS (169)
25	PROTEST	Protest	PROCUREMENT BID ARB (518)
46	PUBLIC HEARING	Public Hearing	INTEGRATED WASTE MGMT (102) CAL TRANS (125) GAMBLING (521)
48	REPRIMAND	Reprimand	CITY OF SACTO (128)
26	RINS	Reduction in Service	TEACHER LAYOFFS (169)
27	RINS/ADA	Reduction in Service/Average Daily Attendance	TEACHER LAYOFFS (169)
28	S OF I	Statement of Issues	PRIVATE INVEST (6) SOCIAL SERVICES 9) SECRETARY OF STATE (10) BARBER BD/COSMETOLOGY (16) CHIRO EXAM (18) ENGINEERS (19) COLLECTION AGCY (20) CSLB (21) CORPORATIONS (23) DENTAL BD (24) EDUCATION (26) FUNERAL DIRECTOR (28) PSYCHOLOGY (30) HORSE RACING BD (31) INSURANCE ((32) INDUSTRIAL RELATIONS (33) PODIATRIC MEDICINE (34) MEDICAL BD (35) BAR (36) DMV (38) RN (40) OSTEOPATHIC BD (42) PHARMACY BD (44) INVESTIGATIVE SERV (45) REAL ESTATE (47) COMM COLL BD GOV (48) SHORTHAND RPTRS (49) REPAIR SERVICES (51) BEHAVIORAL SCIENCE (53) SPCB (54)

Case Type ID	Case Type Name	Description	Agency
			VET MEDICINE (55) VOC NURSE (56) PSYCH TECH (57) TEACHER CRED (58) SMOG CHECK (61) PHYSICIAN ASST (63) RESPIRATORY CARE (64) REAL ESTATE APPR. (65) TEACHER RET (66) PERS (67) ACUPUNCTURE (68) PHYSICAL THER (69) IND MED COUNCIL (79) HOUSING & COMM DEV (81) JUSTICE (83) BOATING/WATERWAYS (88) EMERGENCY MEDICAL SERV. (103) CAL TRANS (125) OTHER (SAC) (130) CITY/COUNTY (LA) (140) OTHER SF (150) PRIV., POSTSEC. & VOC. ED. (504) DPA (515) OPTICIAN-REGISTERED DISPENSING (522) EDUCATION AUDIT PANEL (524) MANAGED HEALTH CARE (526)
34	**SUSPENSION**	Suspension	INSURANCE ((32) DMV (38) CITY OF SACTO (128) OTHER (SAC) (130) CCMERIT BD (145) OTHER SF (150) CLASS EMP (151) STULL/TEN TEACH (200) PERSONNEL BOARD (505) CONTRACT TEACHER DISMISAL (523)
29	**TEN/CAUSE**	Tenured Teacher for Cause	PERS (67)
32	**TERMINATION**	Termination	DENTAL BD (24) MEDICAL BD (35) CITY OF SACTO (128) OTHER (SAC) (130) CCMERIT BD (145) OTHER SF (150) CLASS EMP (151) STULL/TEN TEACH (200)
30	**TSO**	Termination Suspension Order	SOCIAL SERVICES (9)
4	**TSO/ACC**	Termination Suspension Order/Accusation	SOCIAL SERVICES (9)
64	**UNASSIGNED**	Unassigned This is used when a DDS Case is opened and the issue (case type) is not defined.	DDS (84) EARLY START (75)
0	**Z-CANCELLED**	This is no longer used.	N/A
10	**Z-CIT/APPEAL**	This is no longer used.	N/A
11	**Z-CLAIM**	This is no longer used	N/A
45	**Z-CONTINUATION**	This is no longer used	N/A
14	**Z-GRIEVANCE**	This is no longer used	N/A

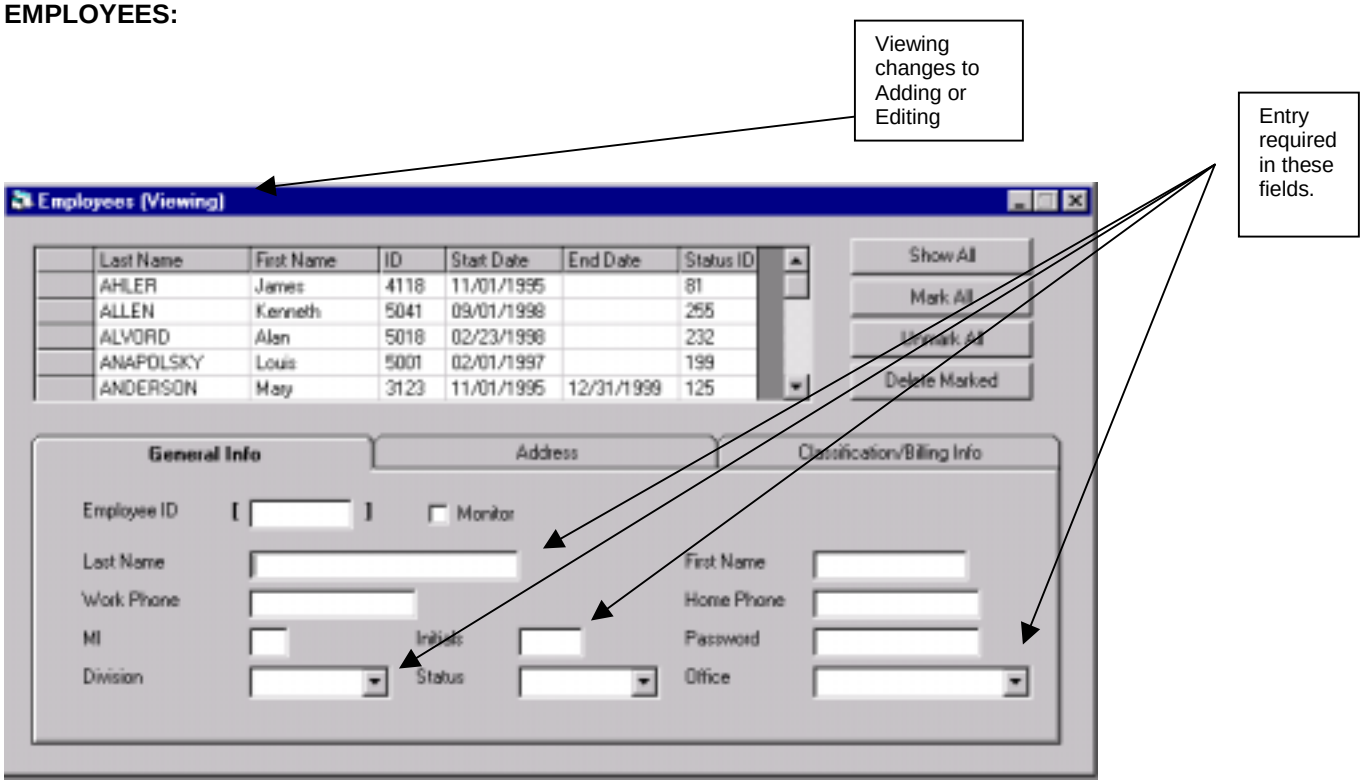
CONFIGURATION:

Main Path = This is the path to the INI file that points to the proper database.
Login File Path = This is no longer used.
Admin Cutoff = This is used to assign the cutoff for entry in the timesheets and invoices for a specific billing month. Administrators need to have a longer period of time to complete the billing process.
ALJ Cutoff = This is used to assign the cutoff for entry in the timesheets for ALJs for aspecific billing month. This prevents entry of time in an inappropriate billing month.



ADMINISTRATIVE TOOLS
TABLES
Part 3

EMPLOYEES:



To Add a new employee:

General Info Tab

Hold Ctrl touch A. The following box appears.

Click **Employee**

You will note that the (Viewing) changes to (Adding).

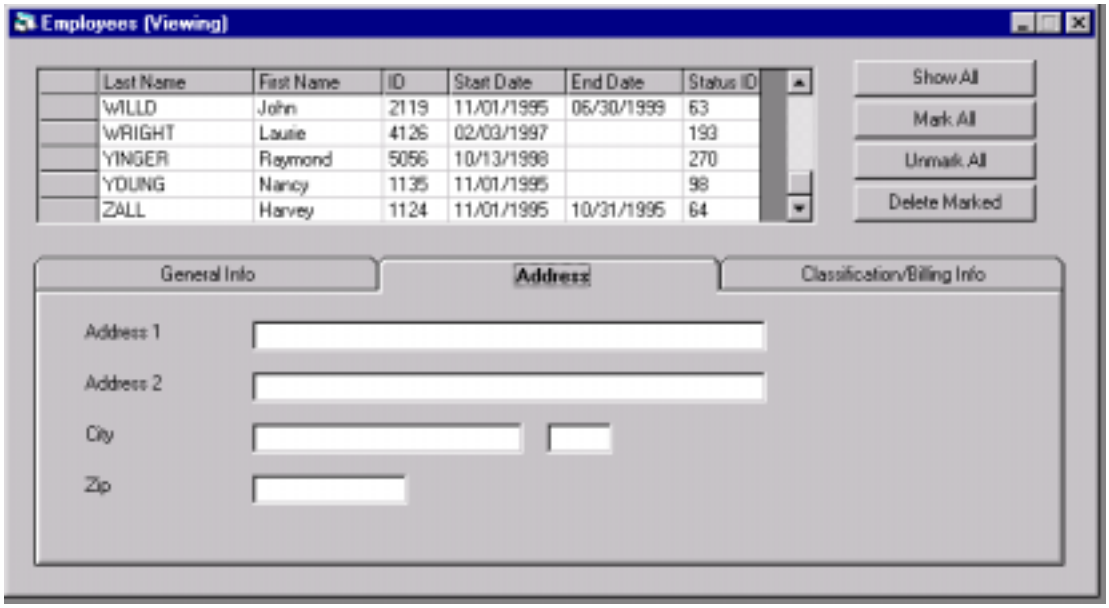
Last Name = All in Uppercase.
First Name = Initial Cap.
Work Phone = Not Required. (It should be entered so that we can run a listing from it.) The number should be entered area code hyphen prefix hyphen telephone number, i.e. 415-555-5555.
Home Phone = This field is not being used at this time but should remain as part of the information.
MI = Not Required. All in Uppercase.
Initials = Required. All in Uppercase.

Password = Not Required. This is usually entered after the employee has been saved. The password is the employee number.

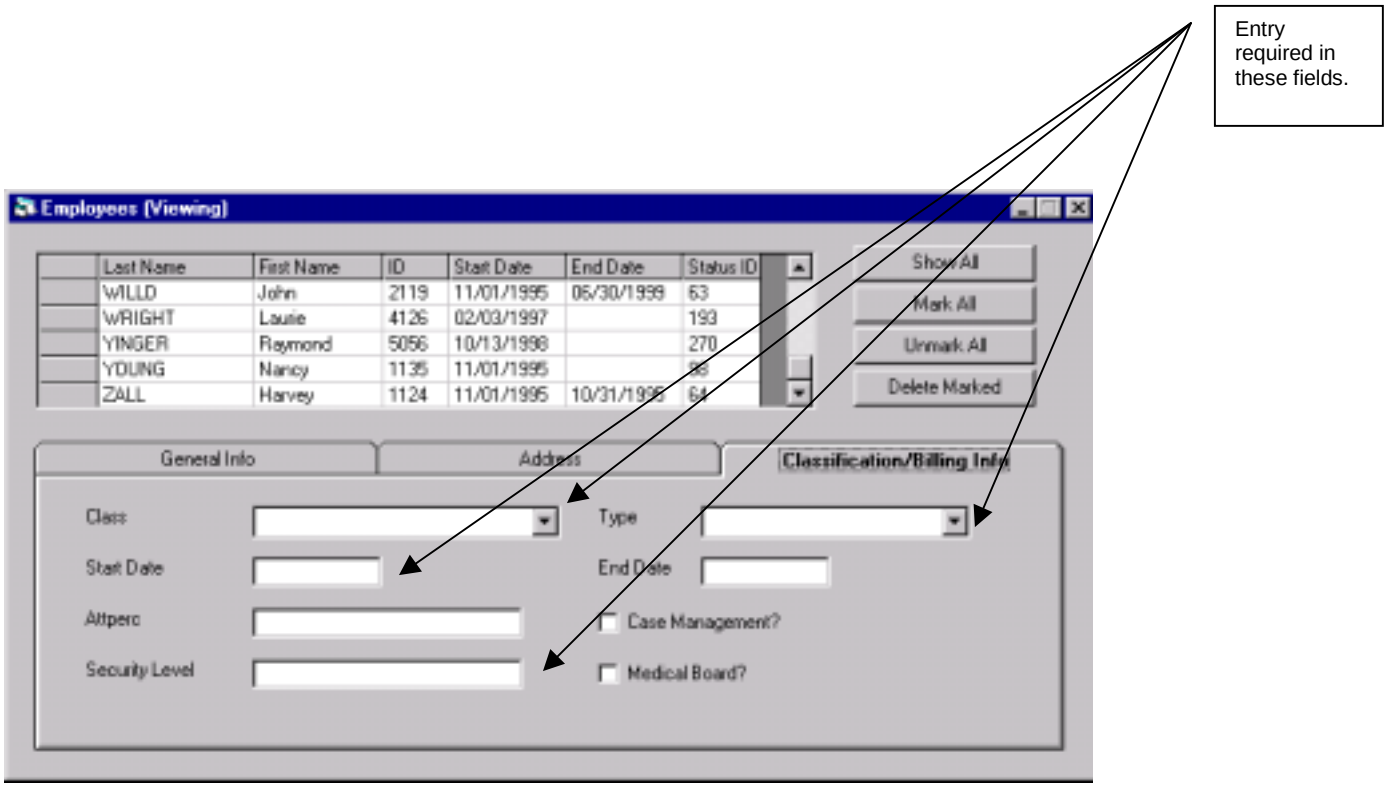
Division = Click on arrow to the right of Division. Select one of the following choices.
Northern (Sacramento or Oakland)
Southern (Los Angeles or San Diego)
Status = Click on arrow to the right of Status. Select one of the following choices.
Active (Currently an employee)
Inactive (Not currently an employee)
Office = Click on arrow to the right of Office. Select one of the following choices.
Los Angeles
Oakland
Sacramento

San Diego

Address Tab



None of this tab is required. It is not currently being used but needs to remain as part of the information.

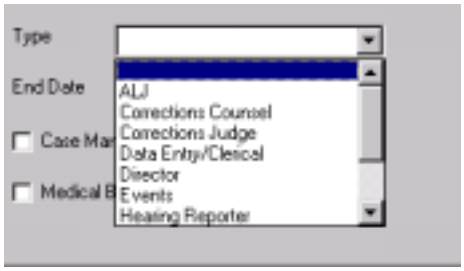


Class = Classification of employee. This is used to determine the default level of security, though the level of security box can be changed to another level. Click on arrow to the right of the Class box and the following pick list appears.

Definition of Employee Classifications:

Class Number	Class Title	Description
1	Administrative Law Judges	Full time Administrative Law Judge. This class will always appear on Calendar
2	Hearing Reporter	OAH Employed Hearing Reporter. Currently there is only one.
3	Electronic Reporter	Contract Electronic Reporter for invoicing purposes.
4	Hearing Officers	THIS IS NO LONGER USED
5	Outside Hearing Reporter	Contract Hearing Reporter for invoicing purposes.
6	Interpreter	Contract Interpreter for invoicing purposes.
7	Clerical	Data Entry Level. (Could be an ALJ.)
8	Administrative	Data Base Administrator
9	Highway Patrol	Highway Patrol used for invoicing purposes when security is requested by OAH and OAH is billed for their services.
10	Events	Names used as placeholders on the Overset calendar screens, i.e., N-Event for Sacramento. This can be added to the Overset calendar from the pick list.
11	Corrections Counsel	These are Contract Counsel under Agency Corrections-Keyhea (90).

Type = These are sub-type references used for reporting purposes. Click on the arrow to the right of the Type box and the following pick list appears.



Abbreviation	Number associated with Class type	Subtype Title	Description
A	1	ALJ	Full-time Administrative Law Judge. This subtype will always appear on calendar. This subtype will appear on the Employee Report as 0%-100+% Hours Charged, with Total Hours Available and leave hours.
AA	1	Retired Annuitant	Retired Annuitant Administrative Law Judge. This subtype will always be available from the Overset Calendar ALJ pick list. This subtype will appear on the Employee Report under Annuitants with 0% Hours Charged and 0 Total Hours Available time or leave time.
AC	0	Corrections Judge	Corrections-Keyhea (90) Agency Administrative Law Judge. This subtype will always be available from the Overset Calendar ALJ pick list. This subtype does not appear on the Employee Report.
AD	1	Director	Director, OAH. This subtype will always be available from the Overset Calendar ALJ pick list. This subtype will appear on the Employee Report under Director with 0% Hours Charged and 0 Total Hours Available and 0 leave hours.
AJ	1	Presiding Judge	Presiding Administrative Law Judge; one in each office. Full-time Administrative Law Judge. This subtype will always appear on calendar as an ALJ. This subtype will appear on the Employee Report as an ALJ with 0%-100+% Hours Charged and with Total Hours Available and leave hours.
AP	0	Pro Tempore	Contract Administrative Law Judge. This subtype will always be available from the

Abbreviation	Number associated with Class type	Subtype Title	Description
			Overset Calendar pick list. This subtype will appear on the Employee Report under Pro Tempore with 0% billing and 0 Total Hours Available or 0 leave hours.
CC	0	Corrections Counsel	Contract Counsel under Corrections-Keyhea (90) Agency. This subtype is not available on the ALJ pick list nor does it appear on any Employee Reports.
D	0	Data Entry/Clerical	Date Entry (permission to edit case and calendar information). This subtype is not available on the ALJ pick list nor does it appear on any Employee Reports.
E	1	Events	Names used as placeholders on the Overset calendar screens. This subtype is available from the ALJ pick list. This subtype does not appear on any Employee Report.
R	0	Hearing Reporter	OAH employed Hearing Reporter. This subtype is not available on the ALJ pick list nor does it appear on Calendar. This subtype does appear on the Hearing Reporter Employee Report. THIS REPORT NEEDS TO BE REVISED. IT IS CURRENTLY NOT WORKING PROPERLY.
S	0	System Administrator/Supervisor	Database Administrator

Start Date = First Date Employee Starts. (This is derived from either an RPA (Request for Personnel Action) generated by the OAH Manager, or from a contract generated by the Associate Analyst. Each of these documents shows a starting date.)

End Date = Last date Employee is employed by OAH. (This is derived from either an RPA (Request for Personnel Action) generated by the OAH Manager, or from a contract generated by the Associate Analyst. Each of these documents shows an ending date.)

Attperc = This is a percent, written as a decimal. The percent is used in generating the Employee report Total Available Hours. It is only relevant to ALJs, Presiding ALJs, Director, Annuitants and Pro Tempores.

Case Management? = A designation of ALJs who handle those cases requiring prehearings. It is not currently being used, but should be retained as an option for future purposes.

Security Level = Level of application access.

- **1** Read Only Permission on all case management, calendar and timekeeping screen forms. Assigned to those employees added for invoicing purposes.
- **2** NO LONGER APPLIES.
- **3** Read Only Permission on most case management and calendar screen forms. Edit/Delete Permissions on timesheets. Assigned to ALJs.
- **4** Edit/Delete Permissions on timesheets and billing. Initially assigned to Account Clerk. NO LONGER APPLIES.
- **5** Editing Permissions on many case management, calendar and timekeeping screen forms. Assigned to employees needing calendaring access.
- **6** Editing Permissions on timesheets for data entry into timesheets. NO LONGER APPLIES.
- **7** Editing/Deleting Permissions on many case management, calendar and timekeeping screen forms. Assigned to lead calendar persons and OAH Accounting Unit Lead Person. (Currently Kathy Rossow, JoAnn McLaughlin and Cheryl Hill).
- **8** Editing/Deleting Permissions on many case management, calendar and timekeeping screen forms. Also, access to other employees' timesheets. Assigned to Managers and Presiding Administrative Law Judges.
- **9** Database Administrator Utilities Manager.

Medical Board? = A designation of ALJs who are on the Medical Board Panels. This is not currently being used, but should be retained as an option for future purposes.

Save record. Click on Disk on the Tool Bar or Click on Record, Save on the Menu Bar.

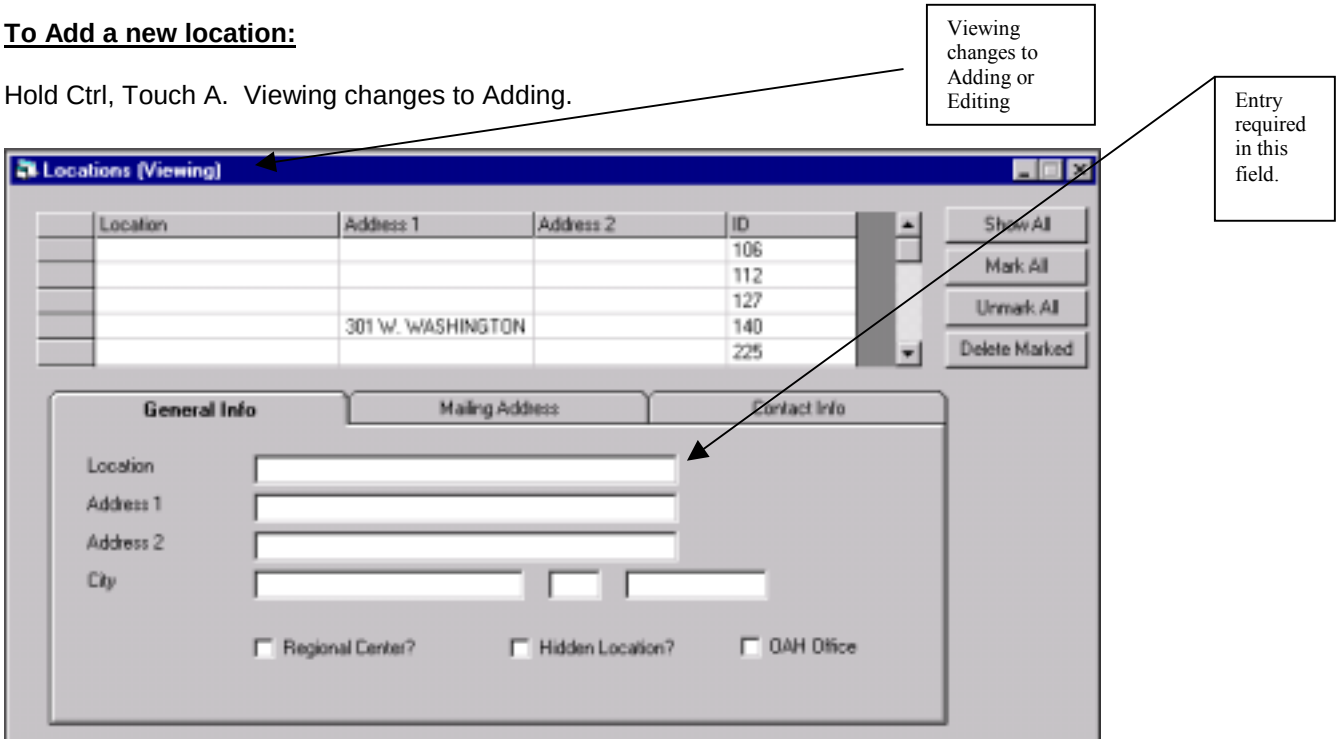
To Edit an Existing Employee:

Double Click on the Employee you wish to edit. The "Viewing" changes to Editing.

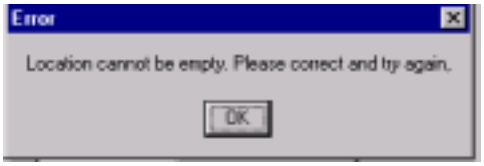
LOCATIONS:

To Add a new location:

Hold Ctrl, Touch A. Viewing changes to Adding.



Location = The name of the place of the location, i.e. Hyde Building, Irvine Unified School District, JKF Library, etc. This should be typed in all uppercase. This is a required field. If you try to save without this field being completed, the following box appears.



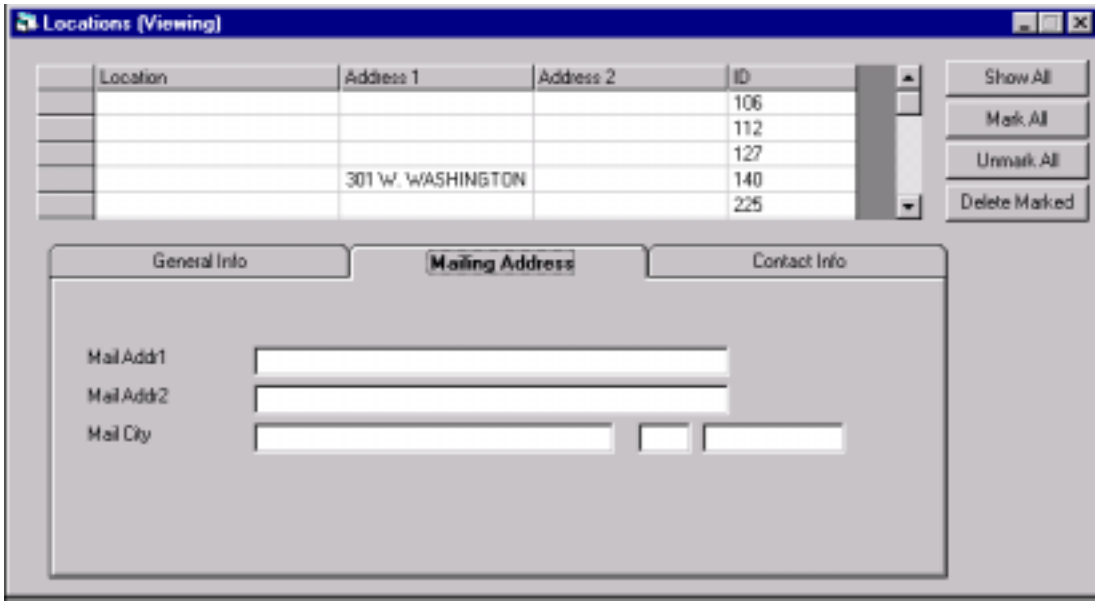
Address 1 = First line of address. This should be typed in all uppercase.
Address 2 = Second line of address. This should be typed in all uppercase.
City = City of location.
Next empty box = 2 digit state abbreviation.
Next empty box = Zip Code; either 5 digit, or 5 digit hyphen 4 digit extension.
Regional Center? = If this is a Regional Center location, then this box should be marked. If you are not sure, if it is a regional center, check with your supervisor before making an entry.
Hidden Location? = This is marked if the location is no longer viable. The location should not be deleted, but removed from the location pick list.
OAH Office = This designates the location as an OAH office. This information is utilized on calendar entries and various reports.

Mailing Address Tab

Mail Addr1 = This only applies to Regional Centers. This information should be entered with initial caps.
Mail Addr2 = This only applies to Regional Centers. This information should be entered with initial caps.

Mail City = This only applies to Regional Centers. This information should be entered with initial caps.

Next empty box = 2 digit state abbreviation. This only applies to Regional Centers. This information should be entered with in all uppercase.
Next empty box = Zip Code, either 5 digit, or 5 digit hyphen 4 digit extension. This only applies to Regional Centers.



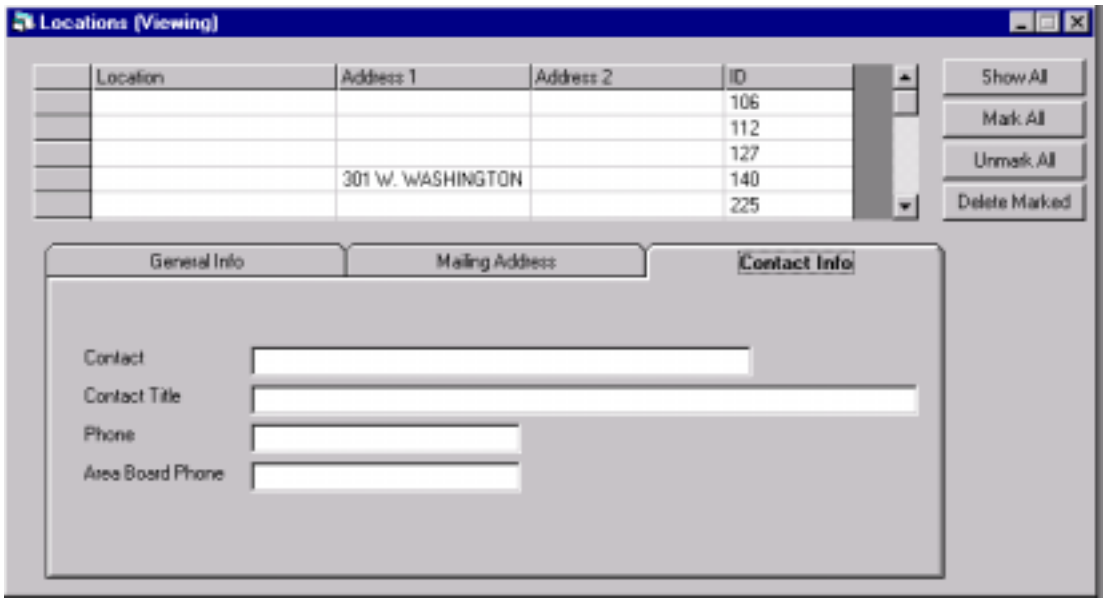
Contact Info Tab

Contact = This information is only used for Regional Centers. The contact person is usually the Director of the Regional Center. This information should be entered in initial caps.

Contact Title = This information is only used for Regional Centers. The Title should be entered in initial caps.

Phone = This information is only used for Regional Centers. This is the Regional Center Telephone Number. The phone number should be entered area code in parenthesis, space, 3 digit prefix hyphen telephone number, i.e. (818) 256-4747. This information is used with the notice of hearing Word macros.

Area Board Phone = This information is only used for Regional Centers. This is the Area Board Telephone number. (See listing of Area Boards and associated counties below.)



Area Board Phone = This information is only used for Regional Centers. This is the Area Board Telephone number. (See listing of Area Boards and associated counties below.)

Area Board
Counties Served
Address
Phone
E-mail

I

Del Norte
Humboldt
Lake
Mendocino
P.O. Box 245
Ukiah, CA 95482
(707) 463-4700
areaone@pacific.net

II

Butte
Glenn
Lassen
Modoc
Plumas
Shasta
Siskiyou
Tehama
Trinity
1367 E. Lassen Ave.#B3
Chico, CA 95926
(530) 895-4027
area2bd@maxinet.com

III

Alpine
Colusa
El Dorado
Nevada
Placer
Sacramento
Sierra
Sutter
Yolo
Yuba
1010 Hurley Way, Ste.195
Sacramento, CA 95825
(916) 263-1150
michaelr@areaboard3.org

IV

Napa
Solano
Sonoma
236 Georgia St. Ste. 201
Vallejo, CA 94590

(707) 648-4073
areabd4@concentric.net

V

Alameda
Contra Costa
Marin
San Francisco
San Mateo
360 22nd St., Ste. 730
Oakland, CA 94612
(510) 286-0439
areabd5@concentric.net

VI

Amador
Calaveras
San Joaquin
Stanislaus
Tuolomne
2529 March Lane, Suite 105
Stockton, CA 95207
(209) 473-6930
ab6@gte.net

VII

Monterey
San Benito
Santa Clara
Santa Cruz
359 Northlake Dr.
San Jose, CA 95117
(408) 246-4355
ab7@ix.netcom.com

VIII

Fresno
Kern
Kings
Madera
Mariposa
Merced
Tulare
770 E. Shaw Ave., Ste. 123
Fresno, CA 93710
(559) 222-2496
abviii@lightspeed.net

IX

San Luis Obispo
Santa Barbara
Ventura
7127 Hollister Ave. Ste 22
Goleta, CA 93117
(805) 685-8395
ABIX@cris.com

X

Los Angeles
411 N. Central Ave. Ste 620
Glendale, CA 91203
(818) 543-4631
ab10@pacbell.net

XI

Orange
250 S. El Camino Real, Ste 110
Tustin, CA 92680
(714) 731-4787
ABXI@primenetwork.net

XII

Inyo
Mono
Riverside
San Bernardino
1960 Chicago Ave. Ste E8
Riverside, CA 92507
(909) 782-3226
AB12@pacbell.net

XIII

Imperial
San Diego
9444 Balboa Ave., Suite 285
San Diego, CA 92123
(858) 637-5572
areabd13@aol.com

Save Record. Click on Disk on the Tool Bar or Click on Record, Save on the Menu Bar.

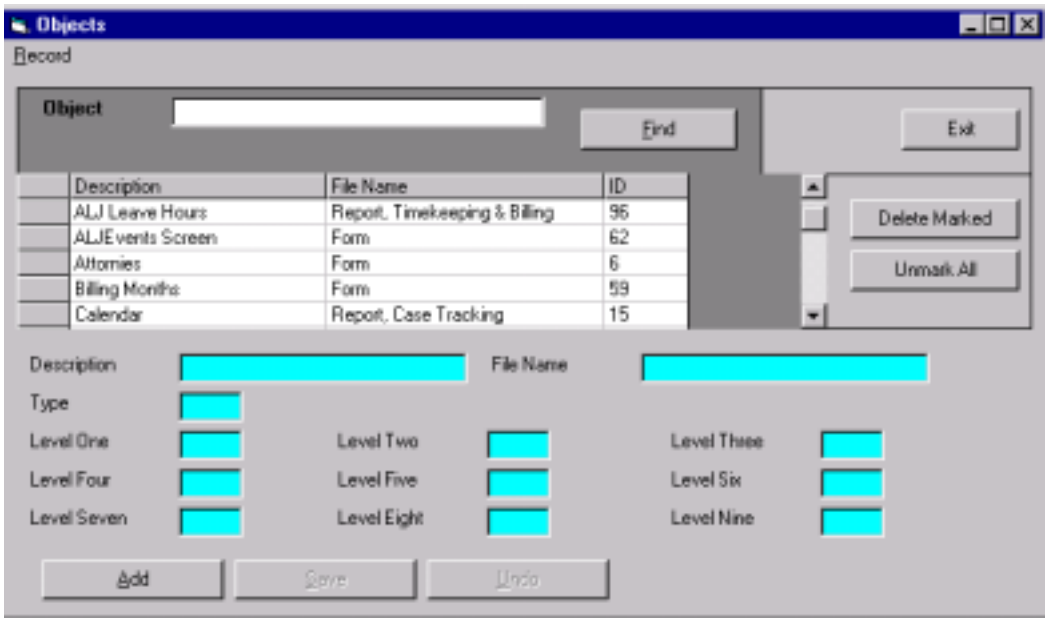
To Edit an Existing Location:

Double Click on the location you wish to edit. The “Viewing” changes to “Editing”.

Save Record. Click on Disk on the Tool Bar or Click on Record, Save on the Menu Bar.

ADMINISTRATIVE TOOLS
TABLES
Part 4

OBJECTS:



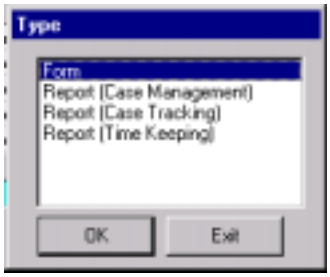
To ADD a new Object:

Click Add
This is not a table that should be updated to "ADD" objects. The "Objects" are forms and reports that are created in the application by a programmer.

To Edit an Object:

Double Click on the Object to edit, or type the name in the FIND field and click Find.

Description = Name of object that appears in the tables or forms lists.
File Name = The actual file name with type extension, i.e. frm, rpt
NOTE: The grid header shows File Name, but the data under the file name is actually the object type.
Type = One of the selections below. When it is "typed" as Report (Case Management), (Case Tracking), or Time Keeping makes it only appear on that list when you select Reports.



Level One = All Security Level 1 users would be assigned the right selected from the pick list, as follows:
Level Two = All Security Level 2 users would be assigned the right selected from the pick list, as follows:

Level Three = All Security Level 3 users would be assigned the right selected from the pick list, as follows:

Level Four = All Security Level 4 users would be assigned the right selected from the pick list, as follows:

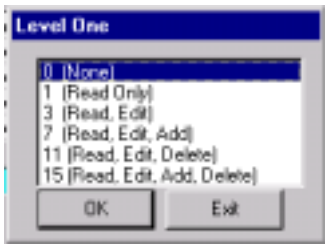
Level Five = All Security Level 5 users would be assigned the right selected from the pick list, as follows:

Level Six = All Security Level 6 users would be assigned the right selected from the pick list, as follows:

Level Seven = All Security Level 7 users would be assigned the right selected from the pick list, as follows:

Level Eight = All Security Level 8 users would be assigned the right selected from the pick list, as follows:

Level Nine = All Security Level 9 users would be assigned the right selected from the pick list, as follows:



NOTE: It doesn't appear that this overrides other permissions.

Click Save.

OFFICES:

New Offices cannot be added.

To Edit an existing office:

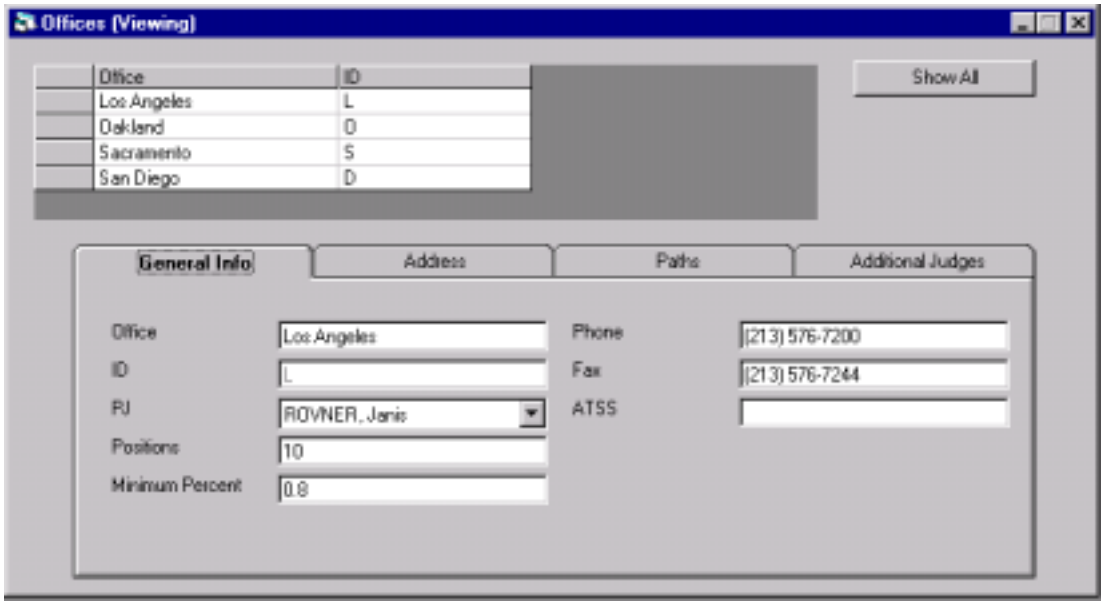
General Tab:

Because of the references in the application the **Office** field should not be edited. It appears that it can be.

ID = Office ID referred to in the application. This field cannot be edited.
PJ = Presiding Administrative Law Judge. Click on the arrow and the entire list of ALJs (including Protems, Annuitants, and will open

NOTE: CURRENTLY ALL TYPES AND CLASSES OF ALJS, ACTIVE OR NOT APPEAR ON THIS LIST. THIS SHOULD BE MODIFIED TO ONLY INCLUDE ACTIVE ALJS.

Positions = 10 is an arbitrary number and doesn't represent anything in particular.
Minimum Percent = .08 I believe to be an arbitrary number.
Phone = Main Telephone number for the office selected. This should be typed (213) 576-7200.
Fax = Fax number for the office selected. . This should be typed (213) 576-7200.
ATSS = CalNet number for the office selected. This should be typed (8)prefix-number. Prefix is the calnet prefix.

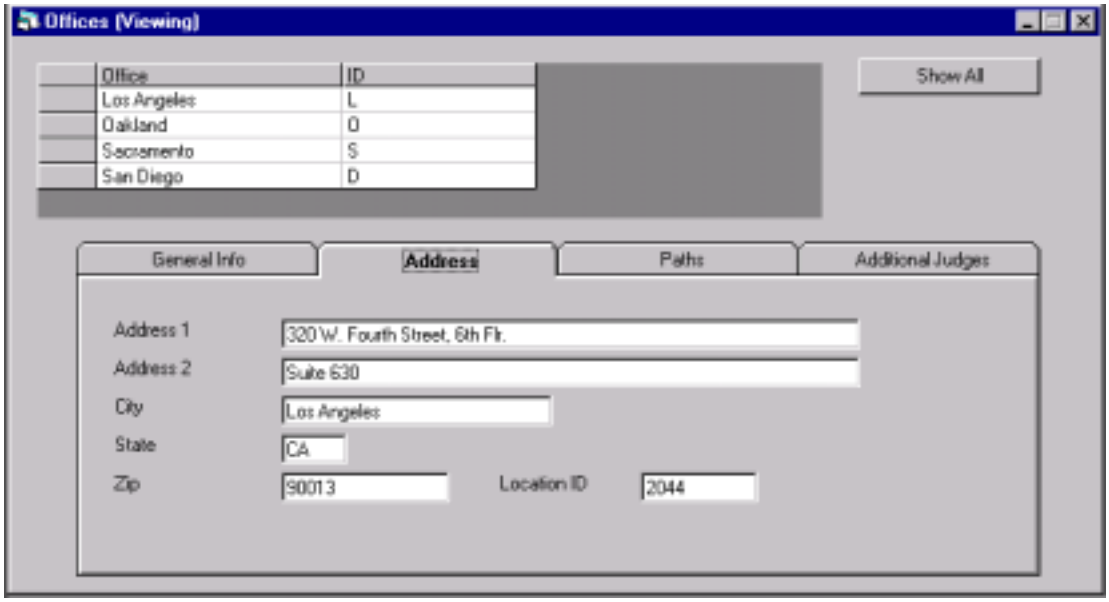


Address Tab:

Address 1 = This information should be entered with initial caps.
Address 2 = This information should be entered with initial caps.

City = This information should be entered with initial caps.

State = 2 character state abbreviation. This information should be entered with in all uppercase.
Zip = Zip Code, either 5 digit, or 5 digit hyphen 4 digit extension.
Location ID = This field should not be edited.



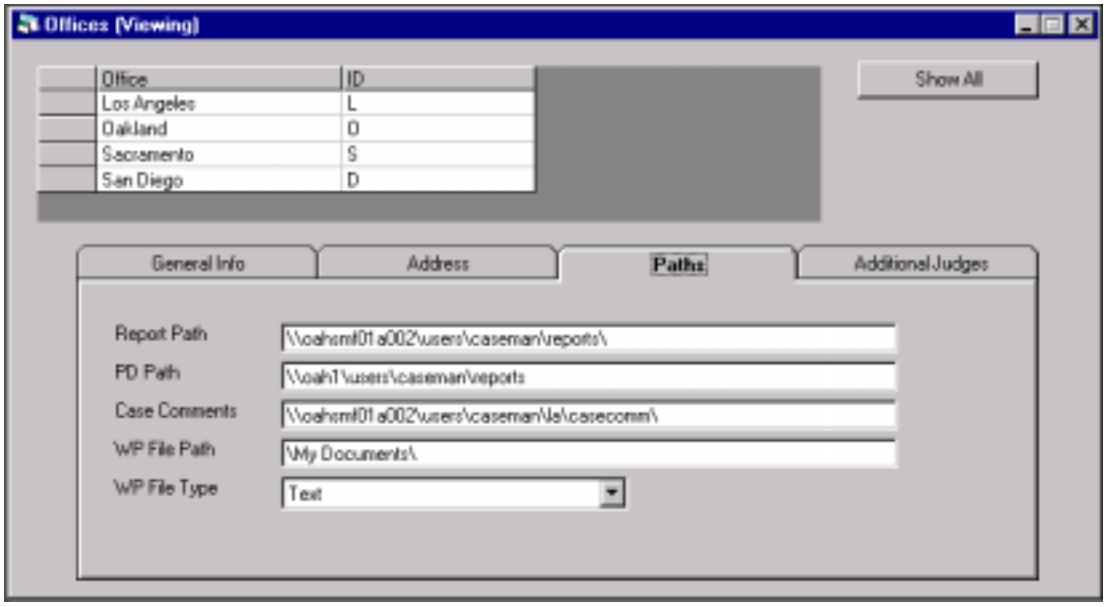
Paths Tab:

Report Path = \\oahsmf01a002\users\caseman\reports\ is the path to where the reports are saved.
PD Path = \\oahsmf01a002\users\caseman\reports\
Case Comments = \\oahsmf01a002\users\caseman\la\casecomm\ is the path where the comments are saved. There is a directory for each office.

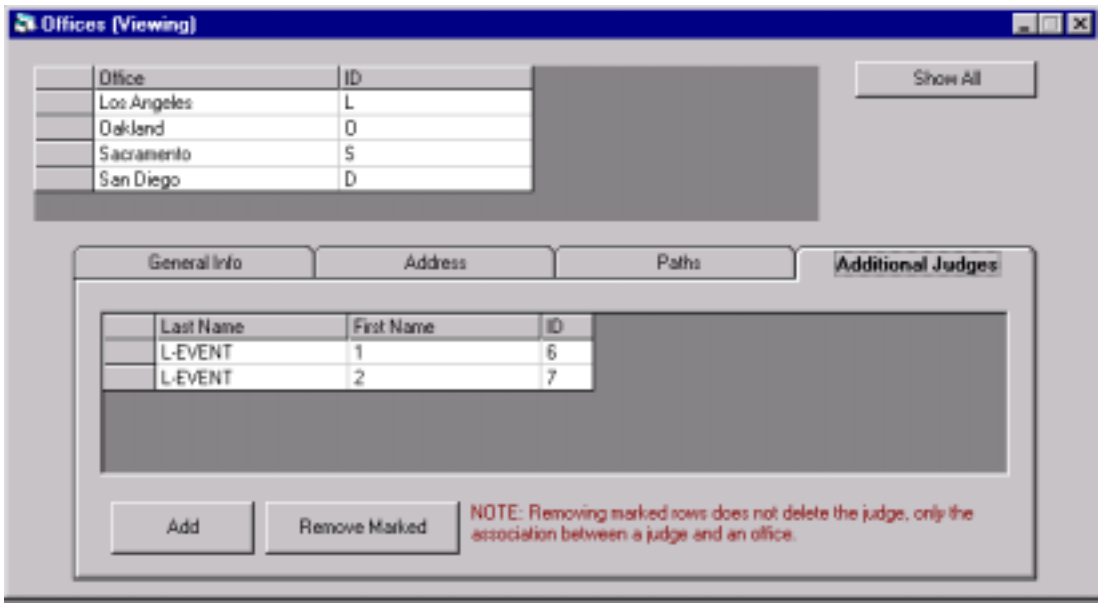
LA = Los Angeles (\\oahsmf01a002\users\caseman\la\casecomm\)
Oak = Oakland (\\oahsmf01a002\users\caseman\oak\casecomm\)
Sac = Sacramento (\\oahsmf01a002\users\caseman\sac\casecomm\)
SD = San Diego (\\oahsmf01a002\users\caseman\sd\casecomm\)

WP File Path = Default directory for saving word processing documents.
WP File Type = Can select the word processing type.

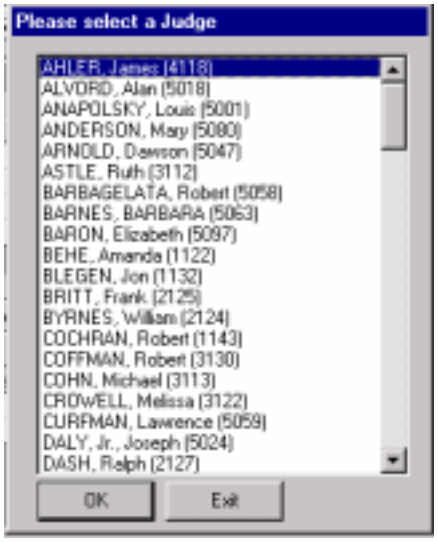
Text
Microsoft Word



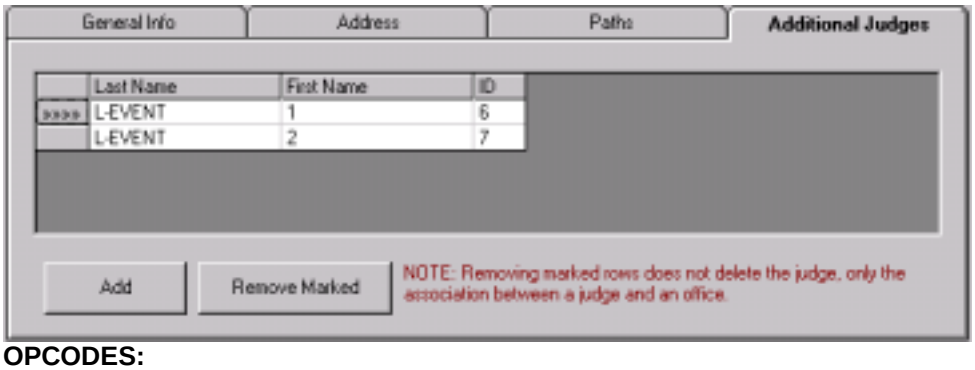
Additional Judges:



To Add The Additional Judges field is used to add ALJs, i.e. protems, annuitants, etc. to the permanent list of oversets. Select an office. Click Additional Judges field. Click Add, the following pick list appears. Select name from list. Click OK.



To Remove Marked = Click on gray box next to a judge. The following double > appear. Click remove marked button.



OPCODES:

OAH Operation Codes are the codes used to describe the services associated with hours logged on timesheets. These services are:

- **Billable** – time chargeable to an agency for services rendered for a specific case (see list below)

OpCode No.	OpCode Name	Activities Covered by OpCode
1	Hearing Preparation	Time spent preparing materials necessary for efficient conduct of hearing.
2	Hearing Time	Time actually spent in hearing on the record or waiting for parties.
3	Decision Time	Time spent, generally following completion of the hearing, preparing PD.
4	Travel billable	Time spent traveling to and from hearing sites (other than OAH regional offices).
5	Allocated Time	When hearing is not in session and ALJ has absolutely no other billable work.

6	Prehearing Conference	Time spent preparing for and conducting pre-hearing conference and orders.
12.	Law & Motion	Time spent on any matter in which party seeks an order by an ALJ
13	Medical Board Training	Time spent by panel ALJs and other ALJs for approved training.
14	Transcript	Time spent by OAH staff reporters preparing transcripts.
15	Settlement	Time spent by settlement ALJ preparing and conducting settlement conference.
42	Calendar (billable)	Time spent by Presiding ALJ or designee setting cases for hearing.
43	Misc (billable)	Time spent on case following issuance of proposed decision.
46	Mediation	Time spent on Mediation.
48	Heather	Time spent by Legal Counsel on research for specific cases.

- **Non-Billable** – Time not chargeable to agencies for specific cases, and also not personal leave time.

OpCode No.	OpCode Name	Activities Covered by OpCode
7	Other	Time spent on non-billable tasks that do not fit into any other category.
8	Calendar (non-billable)	This code has been disabled and should be removed from the list. It still needs to remain as a code since it is associated with many past timesheets.
9	Administration	Time spent by PJ and designees on administrative matters.
10	Training	Time spent on identifiable training.
11	Supervision	Time spent by PJ and designees for supervisory tasks.
44	Travel (non-billable)	Time spent by ALJ traveling to another regional office to hear cases.
45	Transcript (non-billable)	Time spent by OAH staff reporters preparing transcripts ordered and paid for by respondents.
47	Keyhea (Nonbillable)	Time spent in review of Keyhea (Agency 90) files.

- **Personal Leave** = any leave reportable on PAL (Project Accounting and Leave, formerly called "634".

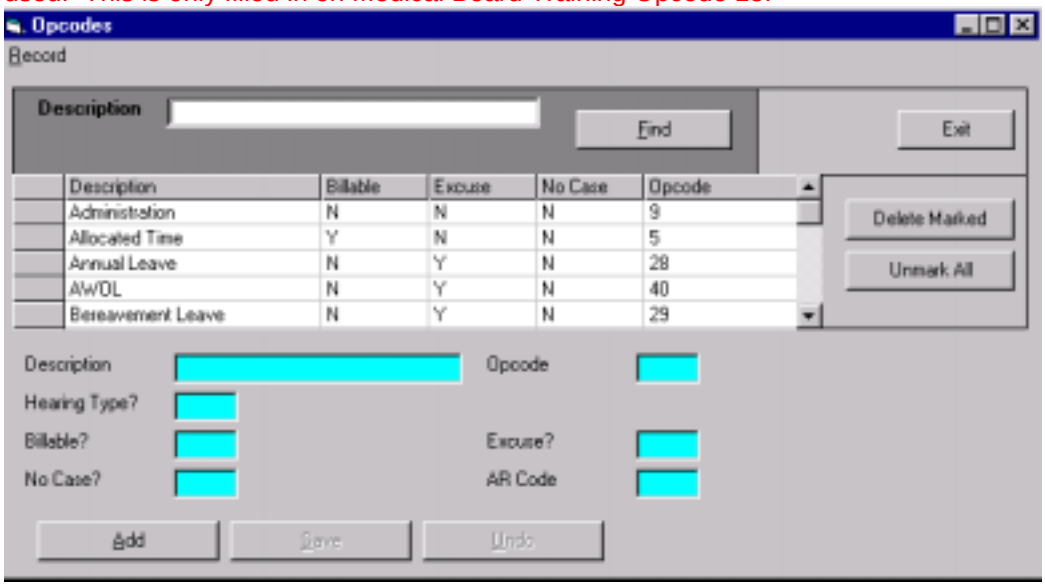
The definition of each of these codes can be obtained from DGS-HR intranet.

OpCode No.	OpCode Name
20	Holiday
21	Jury Duty
22	Leave
23	Other-634
24	Sick Leave
25	Vacation
26	Sick Leave - Family
27	Sick Leave - Death in Family
28	Annual Leave
29	Bereavement Leave
30	Using OT Credit
31	Using Holiday Credit

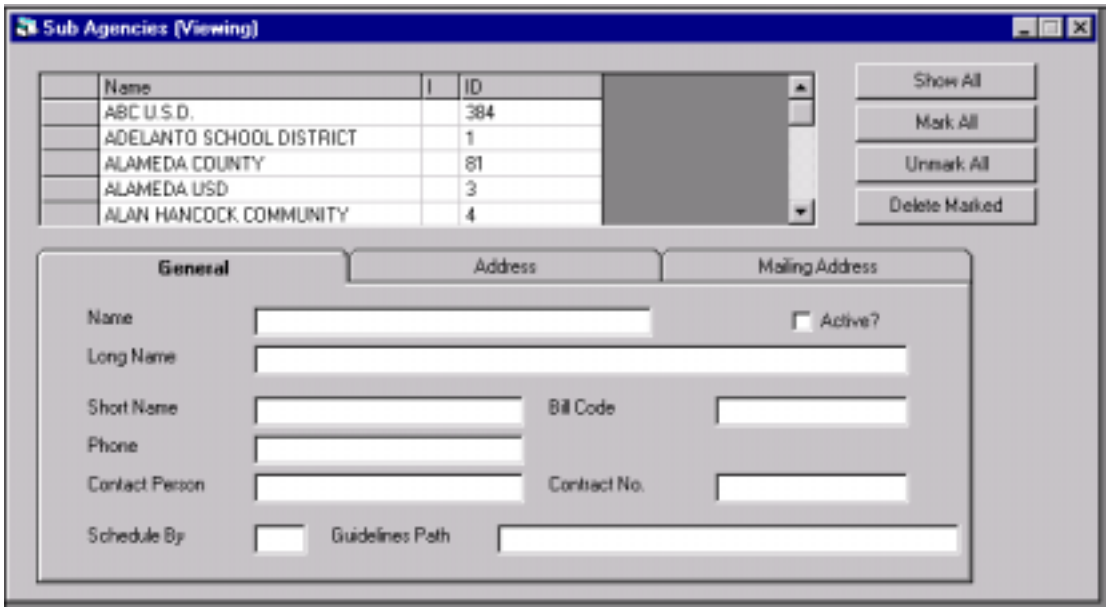
32	Using Excess Hours
33	Using Personal Holiday
34	Using Saturday Holiday
35	Paid Educational Leave
36	Short Term Military Leave
37	Non-Industrial Injury
38	Temporary Disability
39	Industrial Injury
40	AWOL
41	Subpoenaed Witness

Description = Name of Operation Code. Type with initial caps.
Hearing Type? = Default is N(No). There are three billable operation codes associated with hearings:
Hearing Time
Settlement
PreHearing
Each of these has hearing type Y.

Billable? = Default is Y(Yes). Y(Yes) N(No). This is determined by the Administrative Officer.
No Case? = Default is N(No). Y(Yes) N(No). This is always No, unless it has been programmed into the application to be associated with a case number. This is only Y(Yes) on Medical Board Training Opcode 13.
Opcode = Automatically assigned by system.
Excuse? = Default is N(No). Y(Yes) N(No). If this is a Personal Leave code, it will be Yes.
AR Code = There is no default. There is no definition for this, nor is there any reference as to where this is used. This is only filled in on Medical Board Training Opcode 13.



SUB AGENCIES:



To ADD a new sub agency:

Start typing in the Name field. The mode changes to "Adding" instead of "Viewing" mode.

Name = Required Field. The "Name" should be fairly short (15 to 18 characters, including spaces) since it appears on the sub agency pick list. The maximum number of characters allowed is 30, but the whole name is not viewable after it is selected. Type name in uppercase

Active automatically defaults to marked.

Active = Not a Required Field. Currently active Sub Agency. Mark box if Active. Unmark box if not Active.

Long Name = Required Field. A more descriptive name, i.e.:

ALAMEDA COUNTY RISK MANAGEMENT

ANDERSON VALLEY UNIFIED SCHOOL DISTRICT

Type Long Name in uppercase.

Short Name = Required Field. Abbreviated name (10 characters, including spaces):

ANDERSON

ALAMEDA CO

Type Short Name in uppercase.

Bill Code = Required Field. DGS 5 digit billing code. This is entered preceded by a "0" (zero) as a placeholder for future expansion. The billing code is a required entry. This DGS billing code is a code that is assigned by OAH to a local agency. It is possible that even though it is not currently listed in our sub agency list, a number has been assigned. This needs to be confirmed via ABMS.

Phone = Not a Required Field. Should be typed in this format: 916-445-4926

Contact Person = Not a Required Field. Could be Director, Accounting person, etc.

Contract No. = Not a Required Field

Schedule By = Required Field. Defaults to 30 days. This is the usual timeframe. It isn't being used at this time.

Guidelines Path = This field can be removed.

Address Tab:

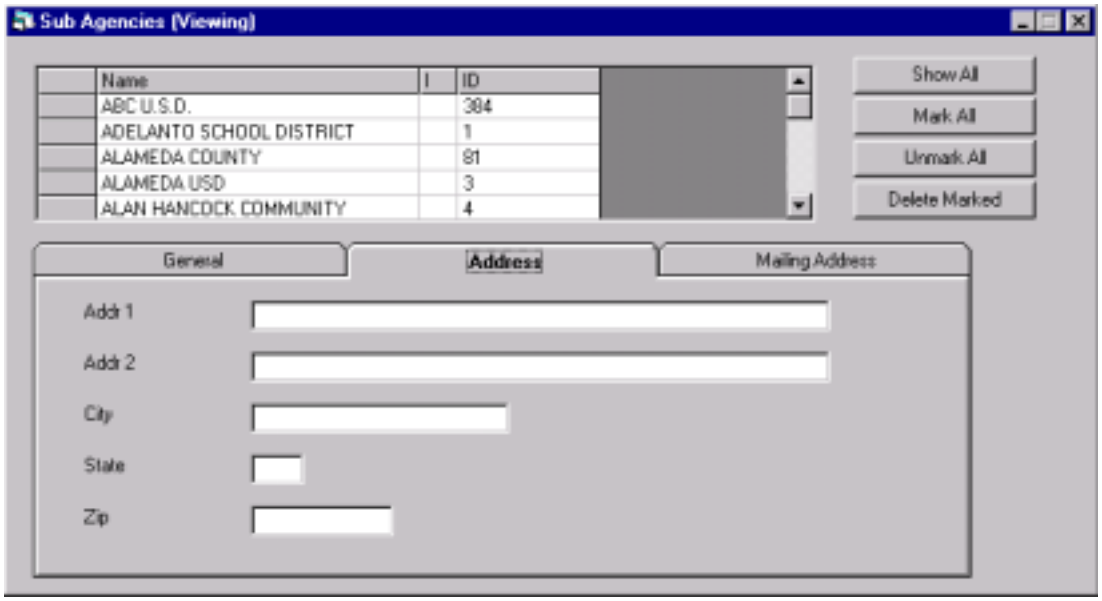
Addr 1 = All in Uppercase

Addr 2 = All in Uppercase

City = All in Uppercase

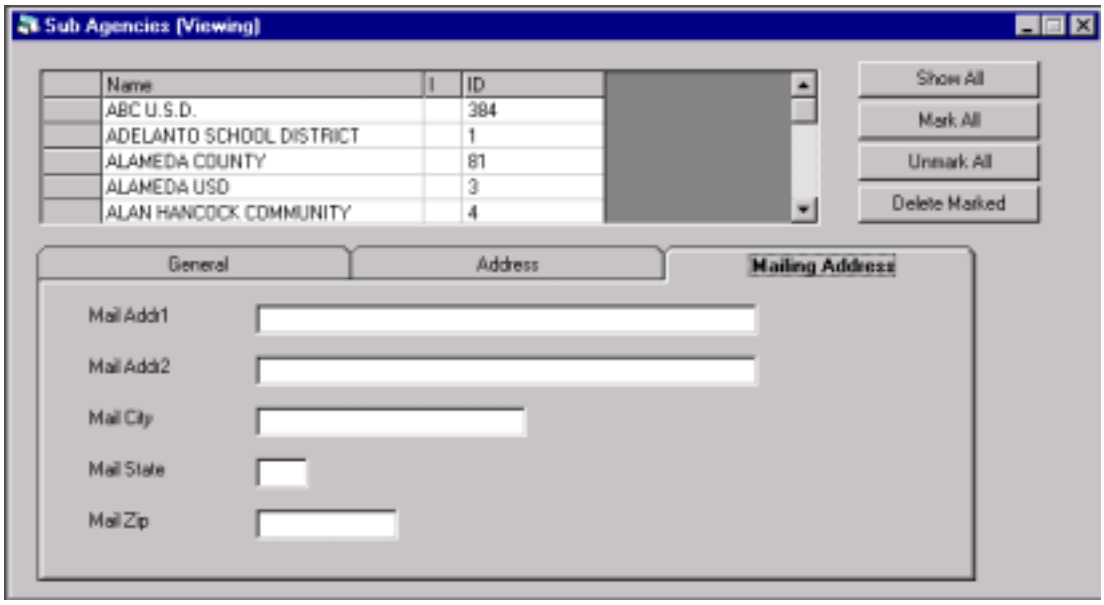
State = All in Uppercase

Zip = Either 5 digit number or 5 digit number hyphen 4 digit extension (95814-3838)



Mailing Address Tab:

Mail Addr 1 = All in Uppercase
Mail Addr 2 = All in Uppercase
Mail City = All in Uppercase
Mail State = All in Uppercase
Mail Zip = Either 5 digit number or 5 digit number hyphen 4 digit extension (95814-3838)



These two tabs pretty much could contain the same information. Initially the Address Tab was to contain the address for accounting purposes. The Mailing Address tab was added for the purpose of preparing labels to the agency directors, etc. Currently the Mailing Address tab is being utilized to complete the address information. These are not required fields, but the information should be filled in.

ADMINISTRATIVE TOOLS
TABLES
PERMISSIONS – FORMS Part 5

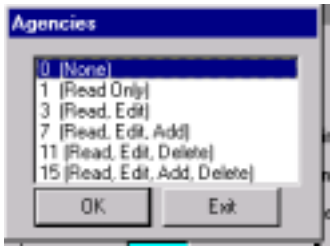
To Edit a Permissions Form:

Employees Security Levels

1, 2*, 4*, 6*	Case 0-
3	Case 4639
5	Case 65527
7	Case 62455
8	Case 13107
9	Case 65535

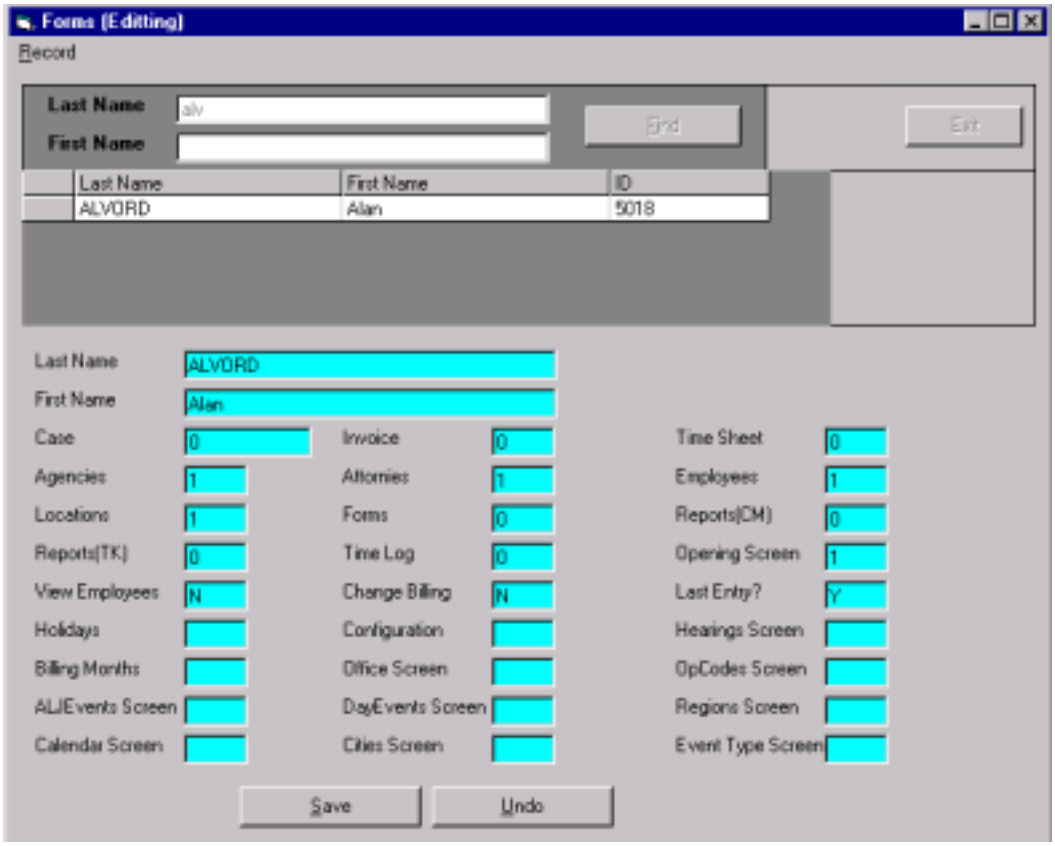
* (These levels are no longer used.)

These are the permissions that can be assigned for each form:

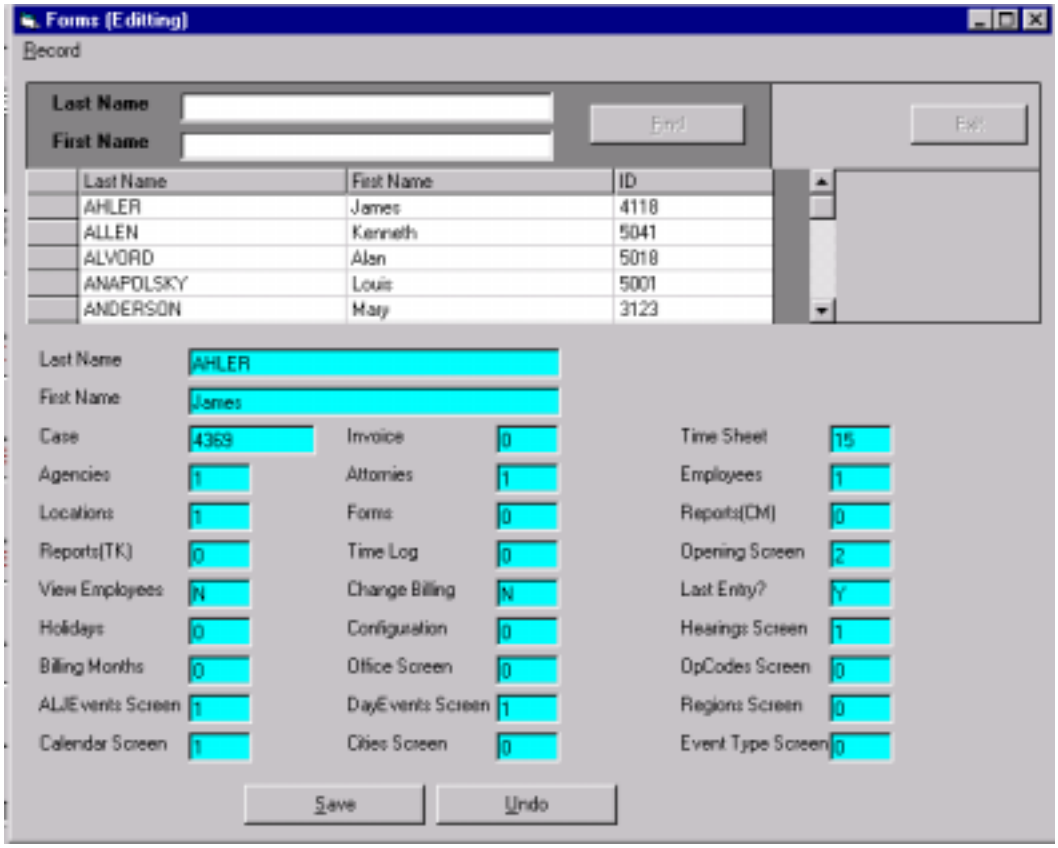


Common employee security assignments:

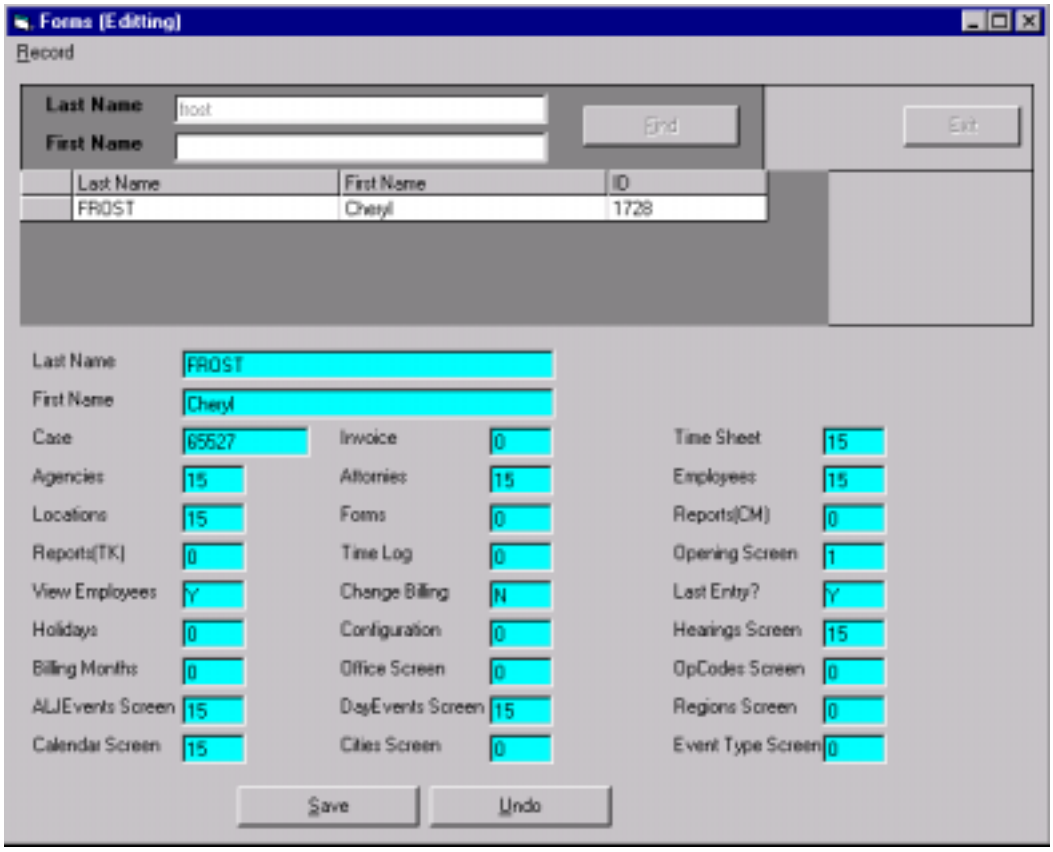
1 = Protems, Annuitants, and all others who do not need access but who need to be listed in Case Management. The following are defaults for a Security 1 user.



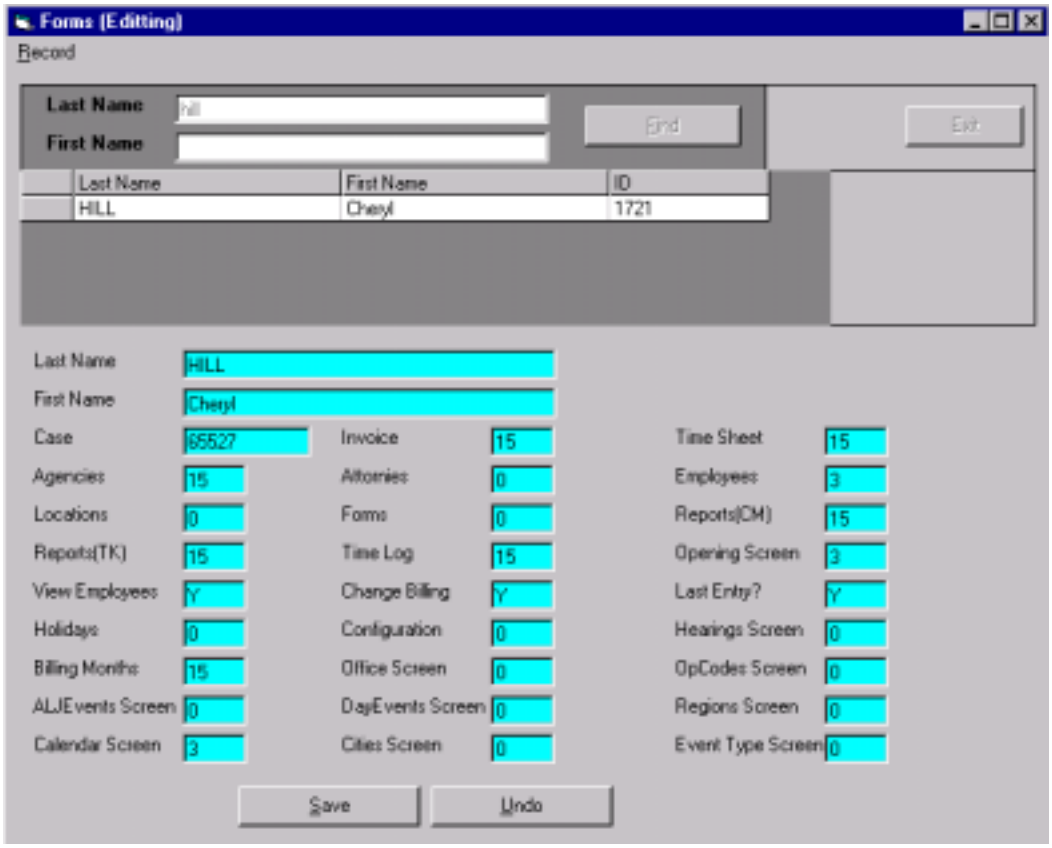
3 = ALJs and OAH Court Reporter. These are common assignments for most ALJs and the one court reporter. The usual change made to permissions is Last Entry? Y or N.



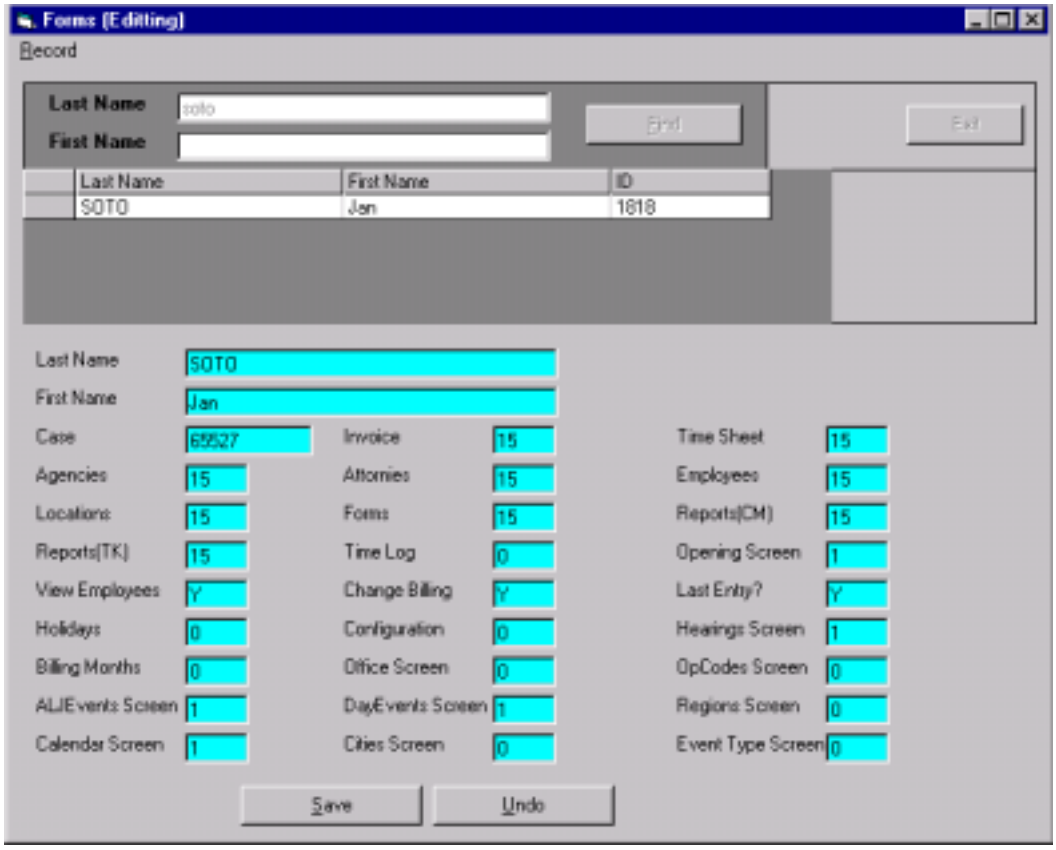
5 = Data Entry and Case Management ALJs. There are few if any adjustments to make to these assignments.



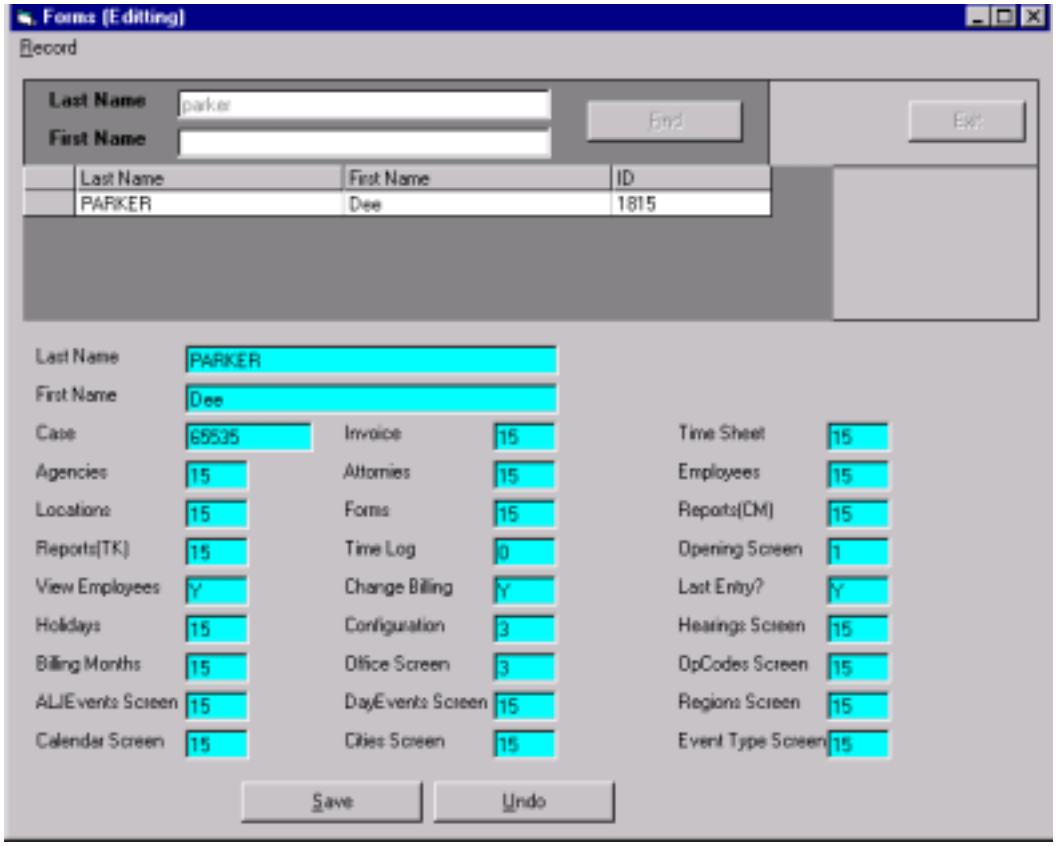
7 = Accountant



8 = Administrative

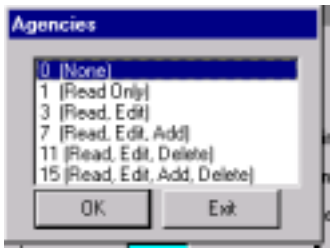


9 = Data Base Administrator. Full permission to all forms.



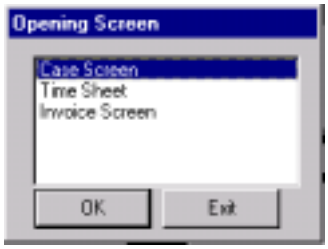
Editing the Form:

Last Name = Not to be edited from this form.
First Name = Not to be edited from this form
Case = This number is assigned based on the Security level assigned in the employees table. It can be edited, but probably has no effect.
Agencies = Select a level of security:



Locations = Select a level of security (0, 1, 3, 7, 11, or 15).
Reports (TK) = Y (Yes) or N (No)
View Employees = Y (Yes) or N (No)
Holidays = Select a level of security (0, 1, 3, 7, 11, or 15).
Billing Months = Select a level of security (0, 1, 3, 7, 11, or 15).
ALJEvents Screen = Select a level of security (0, 1, 3, 7, 11, or 15).
Calendar Screen = Select a level of security (0, 1, 3, 7, 11, or 15).
Invoice = Select a level of security (0, 1, 3, 7, 11, or 15).
Attornies = Select a level of security (0, 1, 3, 7, 11, or 15).
Forms = Select a level of security (0, 1, 3, 7, 11, or 15).

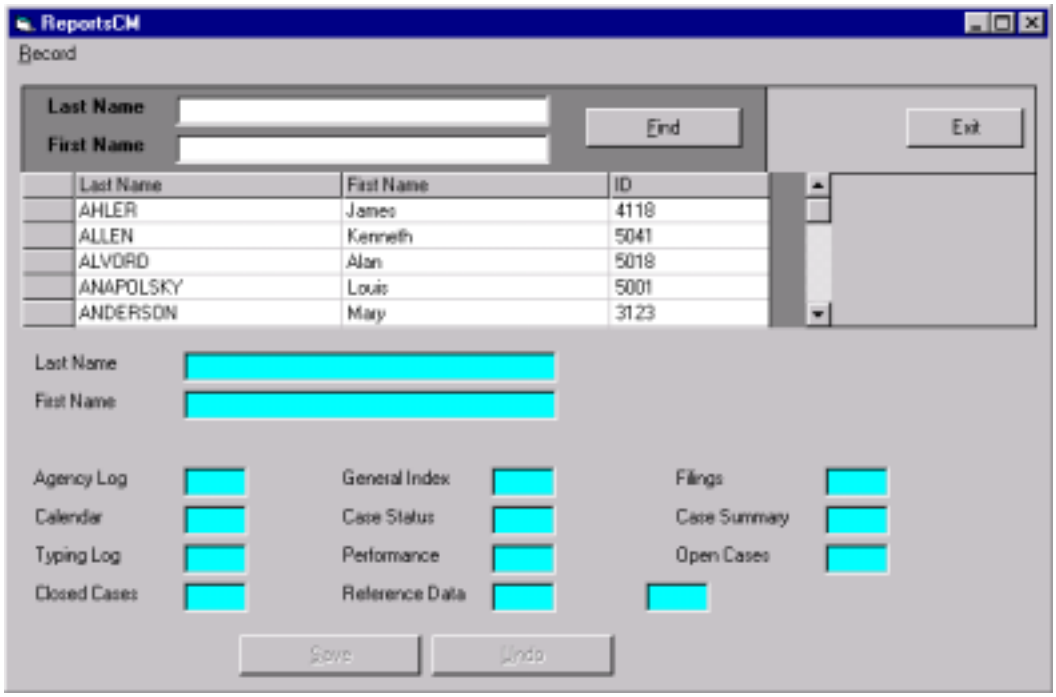
Time Log = Select a level of security (0, 1, 3, 7, 11, or 15).
Change Billing = Y (Yes) or N (No)
Configuration = Select a level of security (0, 1, 3, 7, 11, or 15).
Office Screen = Select a level of security (0, 1, 3, 7, 11, or 15).
DayEvents Screen = Select a level of security (0, 1, 3, 7, 11, or 15).
Cities Screen = Select a level of security (0, 1, 3, 7, 11, or 15).
Time Sheet = Select a level of security (0, 1, 3, 7, 11, or 15).
Employees = Select a level of security (0, 1, 3, 7, 11, or 15).
Reports (CM) = Select a level of security (0, 1, 3, 7, 11, or 15).
Opening Screen = 1, 2 or 3:



Case Screen = 1
Time Sheet = 2
Invoice Screen = 3

Last Entry? = Y (Yes) or N (No) (This is in reference to the TimeSheet. It can open to either the last entry or the current date.) Y= Last Entry. N= Current Date.
Hearings Screen = Select a level of security (0, 1, 3, 7, 11, or 15).
OpCodes Screen = Select a level of security (0, 1, 3, 7, 11, or 15).
Regions Screen = Select a level of security (0, 1, 3, 7, 11, or 15).
Event Type Screen = Select a level of security (0, 1, 3, 7, 11, or 15).

To Edit a Permissions (Reports CM) Form:

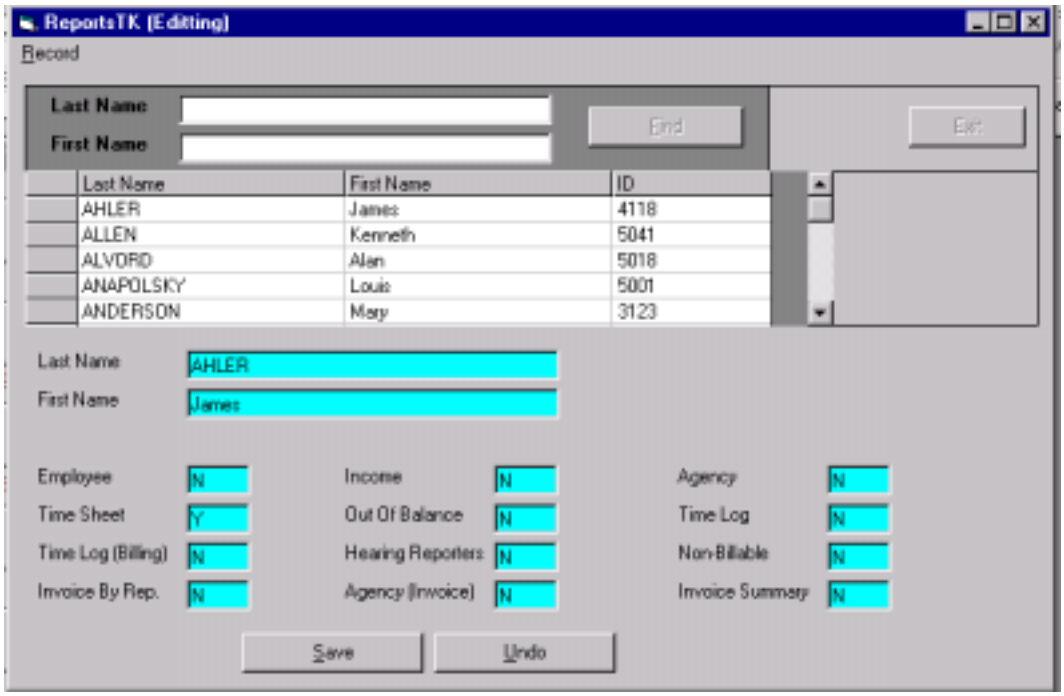


Listed below are the Case Management (CM) Reports to which permissions can be granted. Not all of the case management reports are in this list, which means there are some reports to which permission cannot be granted.

Granting permissions to these does not appear to have any effect on a new employee. There is no need to assign permissions to individual reports. This can be eliminated.

Agency Log = Y (Yes) or N (No)
Calendar = Y (Yes) or N (No)
Typing Log = Y (Yes) or N (No)
Closed Cases = Y (Yes) or N (No)
General Index = Y (Yes) or N (No)
Case Status = Y (Yes) or N (No)
Performance = Y (Yes) or N (No)
Reference Data = Y (Yes) or N (No)
Filings = Y (Yes) or N (No)
Case Summary = Y (Yes) or N (No)
Open Cases = Y (Yes) or N (No)
Blank Box = Y (Yes) or N (No)

To Edit a Permissions (Reports TK) Form:



Listed below are the Time Keeping (TK) Reports to which permissions can be granted. Not all of the time keeping reports are in this list, which means there are some reports to which permission cannot be granted.

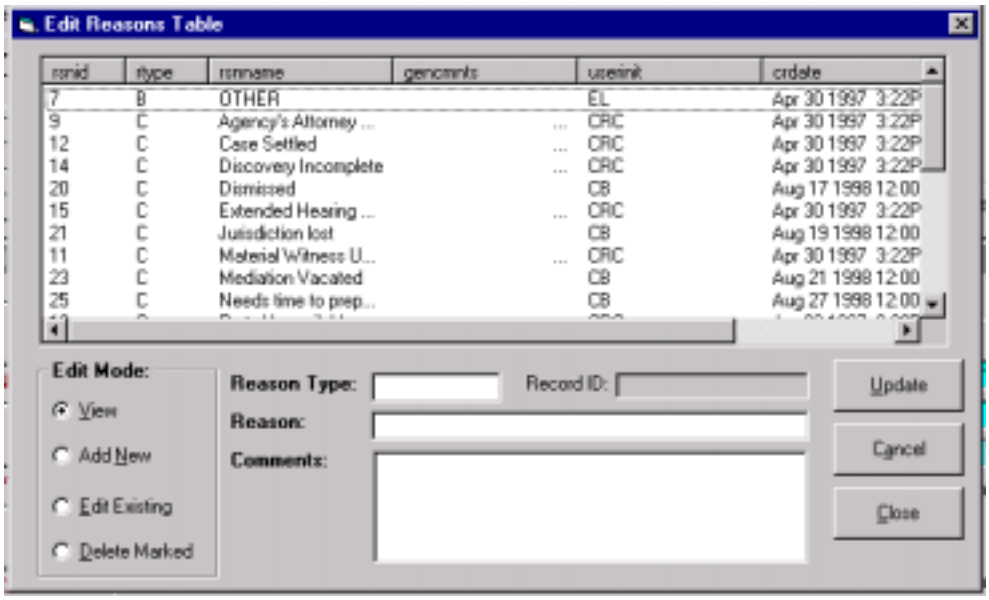
Granting permissions to these does not appear to have any effect on a new employee. There is no need to assign permissions to individual reports. This can be eliminated.

Employee = Y (Yes) or N (No)
Time Sheet = Y (Yes) or N (No)
Time Log (Billing) = Y (Yes) or N (No). This report no longer exists.

Invoice By Rep. = Y (Yes) or N (No)
Income = Y (Yes) or N (No). This report needs to be revised.
Out of Balance = Y (Yes) or N (No). This report no longer exists.
Hearing Reporters = Y (Yes) or N (No). This report needs to be revised.
Agency (Invoice) = Y (Yes) or N (No)
Agency = Y (Yes) or N (No)
Time Log = Y (Yes) or N (No). This report no longer exists.
Non-Billable = Y (Yes) or N (No). This report no longer exists.
Invoice Summary = Y (Yes) or N (No)

To Edit Reasons Table:

Reason Type: =
C = Continuance Reason
S = Settlement Reason
B = Both
Record ID: = Cannot be edited. This number is generated by the application.
Reason: = a descriptive name of the reason.
Comments: = Additional information regarding the reason.



The choices of "**Edit Mode:**" are
View = Default Mode which allows "Read Only" of existing Reasons.
Add New = Opens a new window which allows the entry of a new Reason.
Edit Existing = Highlight a reason, then **Click** Edit Existing, or **Click** Edit Existing then highlight a reason.
Delete Marked = Highlight a reason, then **Click** Delete Marked. This will permanently delete the Reason.

Update = is used to save the added or existing record.
Cancel = will cancel the current activity and close the window without saving the record.
Close = will close the window without saving the record.

DELETE CASES.

Before a case is deleted:
1) Check the filing date to see if the filing fee has been billed yet. Billing is for 1 month in arrears and is usually completed by the 20th of the month.
2) If the filing fee has **not** been billed, then proceed to number 4) below.

3) If the filing fee **has been billed**, then a credit has to be issued to that agency for that filing fee. Notify the OAH Accounting Section.

4) The Agency Report needs to be run for the agency for whatever timeframe is affected to see what other billings have been charged to the agency. Once the report has been run, and the amount of credit has been determined, then the case can be deleted.

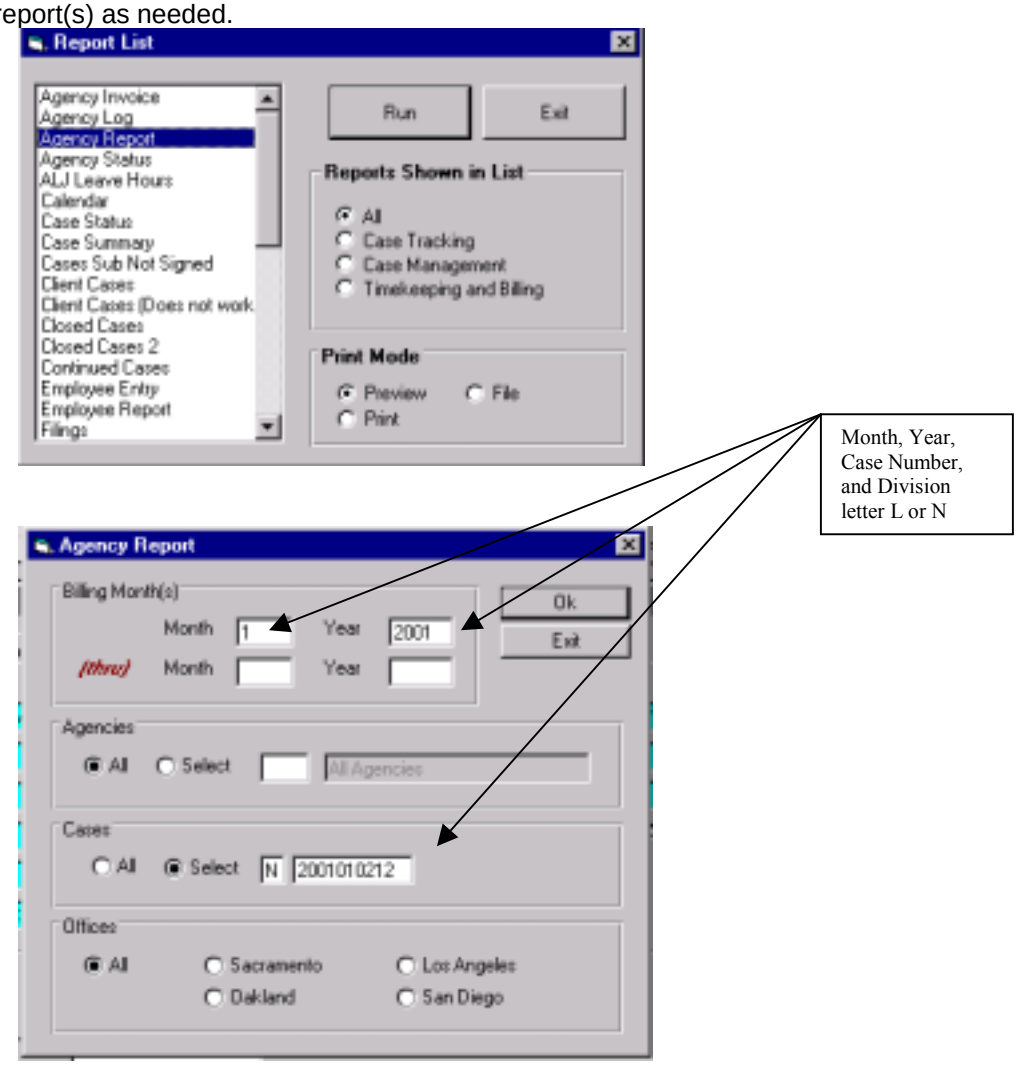
5) To Run Report:

Click "**Reports**" on Menu Bar

Highlight "Agency Report" on the list, Double **Click** on the report, or **Click** "**Run**" Button

Under Billing Month, fill in month and year to run. This would be the month and year filed, through the current date. It is necessary to run ***each*** month individually from date filed to current in order to be able to credit for each month on the ledger.

Under Cases, **Click** the "**Select**" circle. Fill in the Case Number, including the Division letter L or N. **Click** OK. Print the report(s) as needed.



6) If time has been charged to the agency, it will be necessary to go to each timesheet and delete that time before the case can be deleted. The agency report shows the charges by ALJ Employee number and since you have run the report for a specific month, it should be pretty clear which entries need to be deleted. Print the timesheets affected before making changes.

(**NOTE**: After selecting ALJ and the correct timesheet, **Click** on "Month" in the right hand corner of the timesheet to be able to scroll through all the entries for the month, rather than doing a daily search.

7) To Delete a Case:

Click on Respondents Tab. If a Respondent is listed, then **Click** "Mark All" Button". **Click** "Delete Marked".

Click Hearings Tab. If hearings are listed, **Click** Hearing Reporters for each day of hearing. If a Reporter is listed, then **Click** "Mark All" Button. **Click** "Delete Marked" Button.

Click Exit to return to Hearings Tab. If hearings are listed, then **Click "**Mark All" Button. **Click "**Delete Marked" Button.

Close case form. **Click** on in right corner of form.

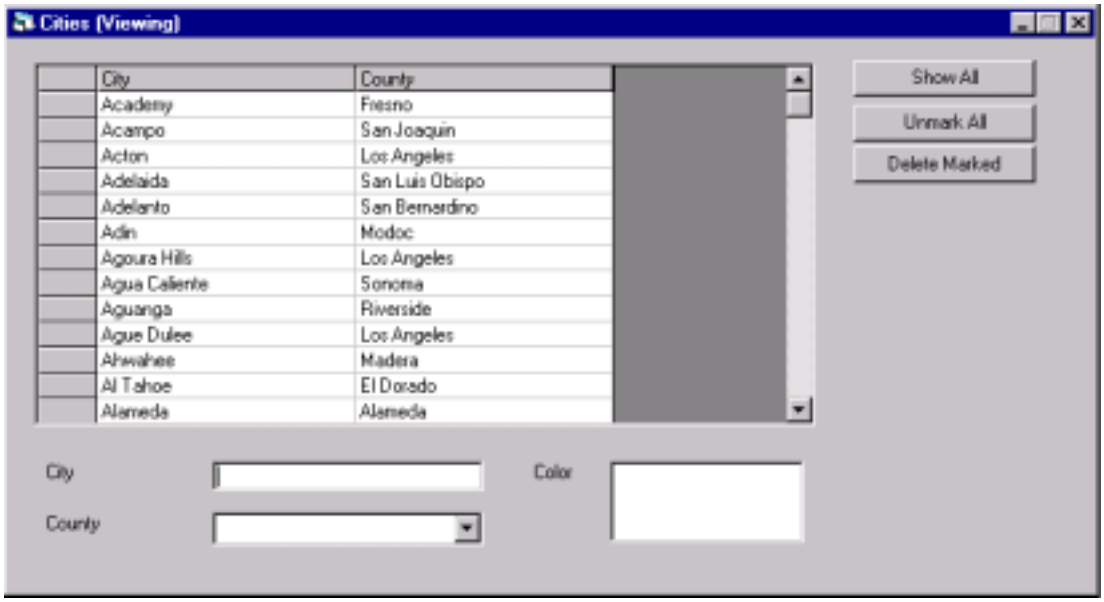
Click on the gray box next to the case name that you wish to delete. These marks appear in that box .

To the right of the grid listing the cases, **Click** on "Delete Marked Cases".

You will be prompted with a message: "Are you sure? This process is irrevocable." **Click** Yes. If you receive a message that the case cannot be deleted, it is because something still needs to be deleted either on the case form or on a time sheet. Review the above steps to make sure all has been deleted. If necessary, rerun the reports to make sure the timesheets have been cleared. Try to delete the case again.

After the case has been deleted, notify the Accounting Section (if the request for deletion was an e-mail, then forward this with a note that the copies of the timesheets (if any) and agency report (if any) will be forthcoming) and give the Accounting Section copies of the timesheets and/or agency report as necessary.

Cities:

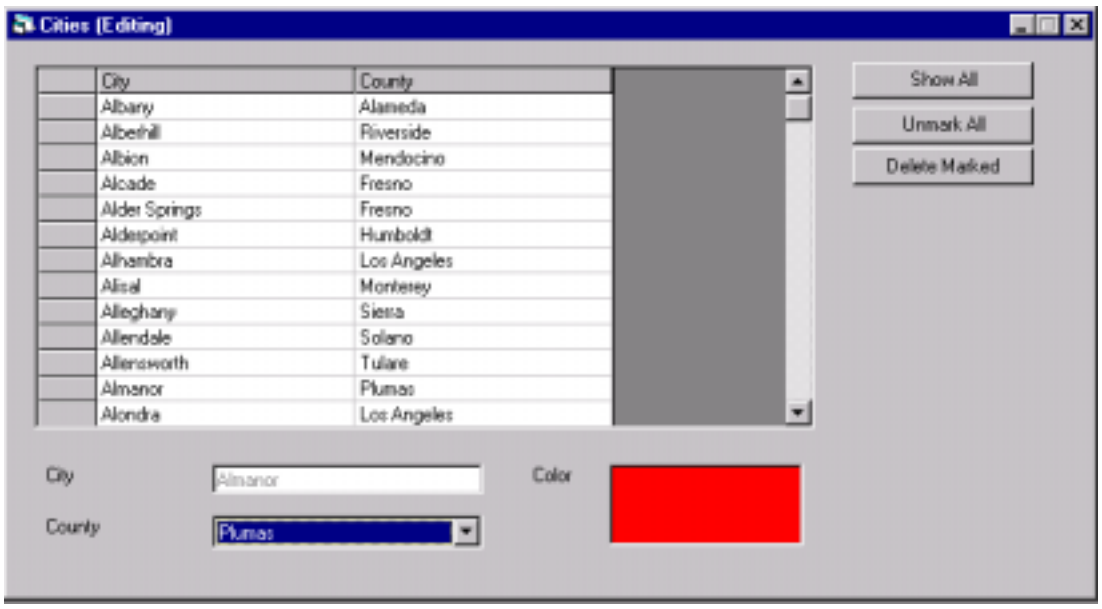


To Add a City and County:

Click Record on the Menu Bar, Click Add or Hold Ctrl, touch A.
The County within a Region determines the color for that particular city.

To Edit a City or County:

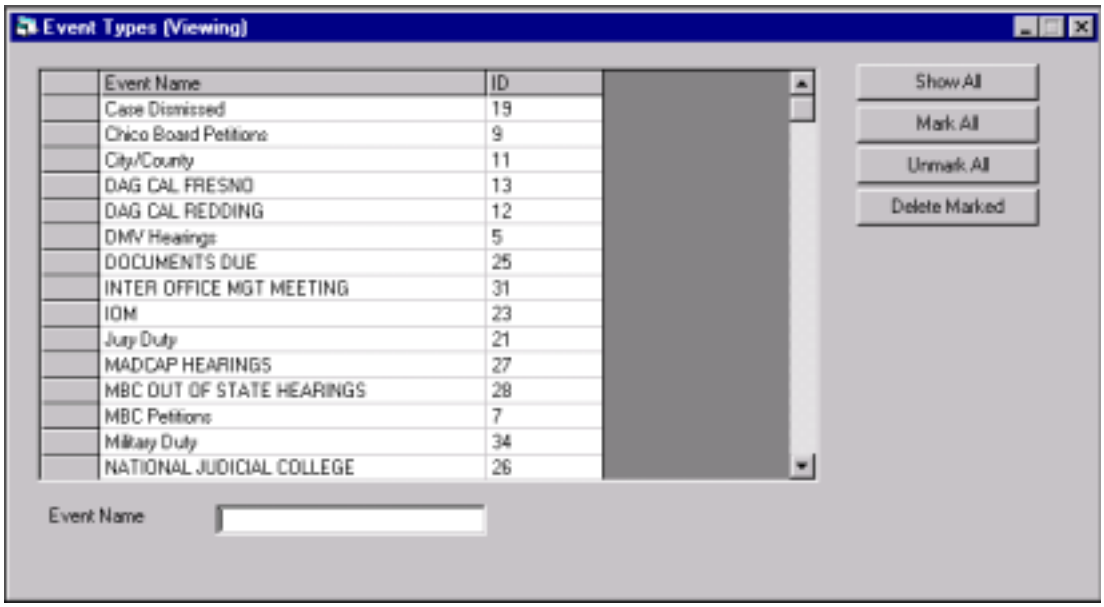
Click on an existing city.
Click on arrow to the right of the county, then select a county.
This brings you into Editing mode, but you cannot change the city.
You would have to delete the city and put it back in to change the spelling.



Events:

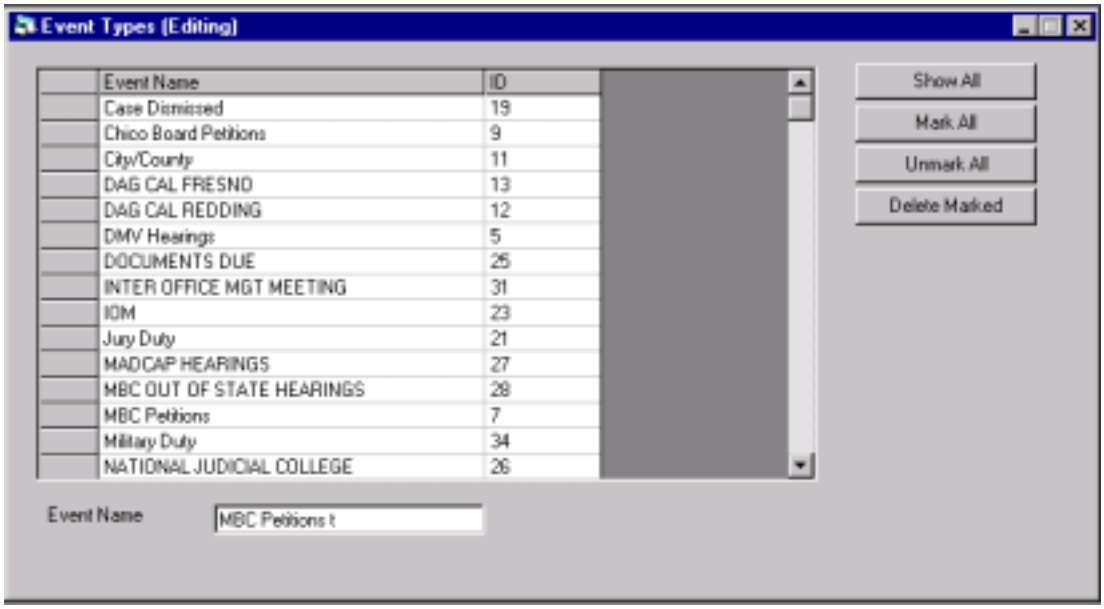
To Add an Event:

Click on Record on the Menu Bar, Click on Add, or Hold Ctrl and Touch A.

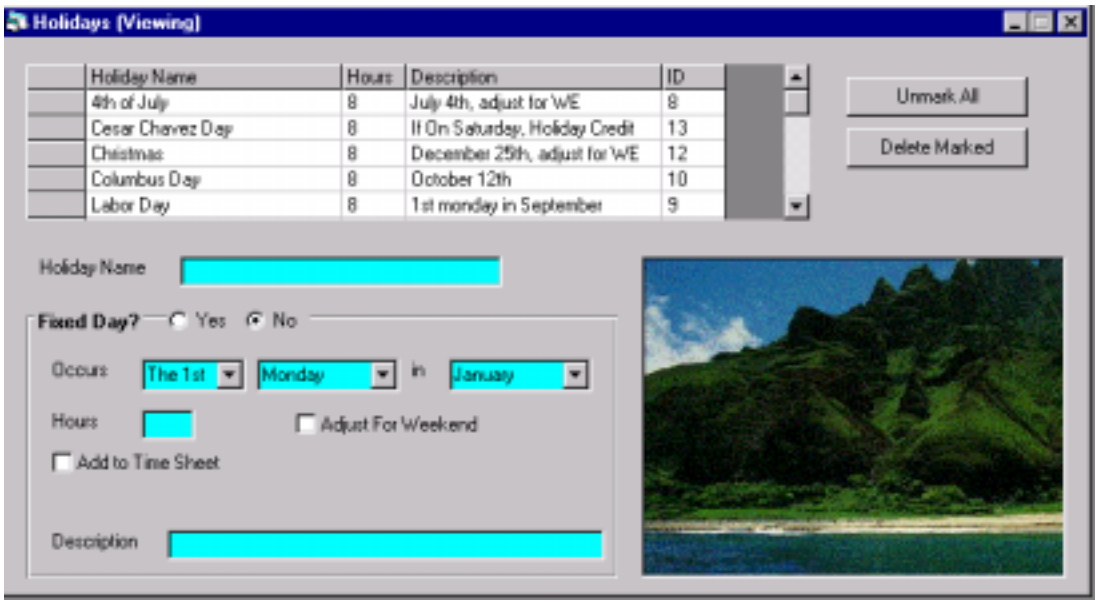


To Edit an Event:

Click on an Event, type a letter or space after the name and it brings you to Edit mode. Now you can edit, save and do an undo.



Holidays:



To Add a Holiday:

Click Record on the Menu Bar, Click Add or Hold Ctrl and Touch A.

Fixed Day? Yes or No.

Any day that always falls on the same date, (like Christmas 12/25) is a fixed day. Y

Any day that falls on a day during the month, i.e. Thanksgiving is the fourth Thursday of the month, would be a non-fixed day or N.

A Holday consists of:

Occurs on:

Every
The 1st
The 2nd
The 3rd
The Last

Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

In:

January
February
March
April
May
June
July
August
September
October
November
December

Hours:

Enter the normal # of hours allowed for each day, i.e. 8.

THE NUMBER OF STANDARD HOURS MAY CHANGE, THOUGH IT MAY JUST CHANGED IN CODE. 8 HOURS IS STANDARD, BUT IF PERSONS WORK DIFFERENT SHIFTS THE NUMBER OF HOURS WOULD VARY.

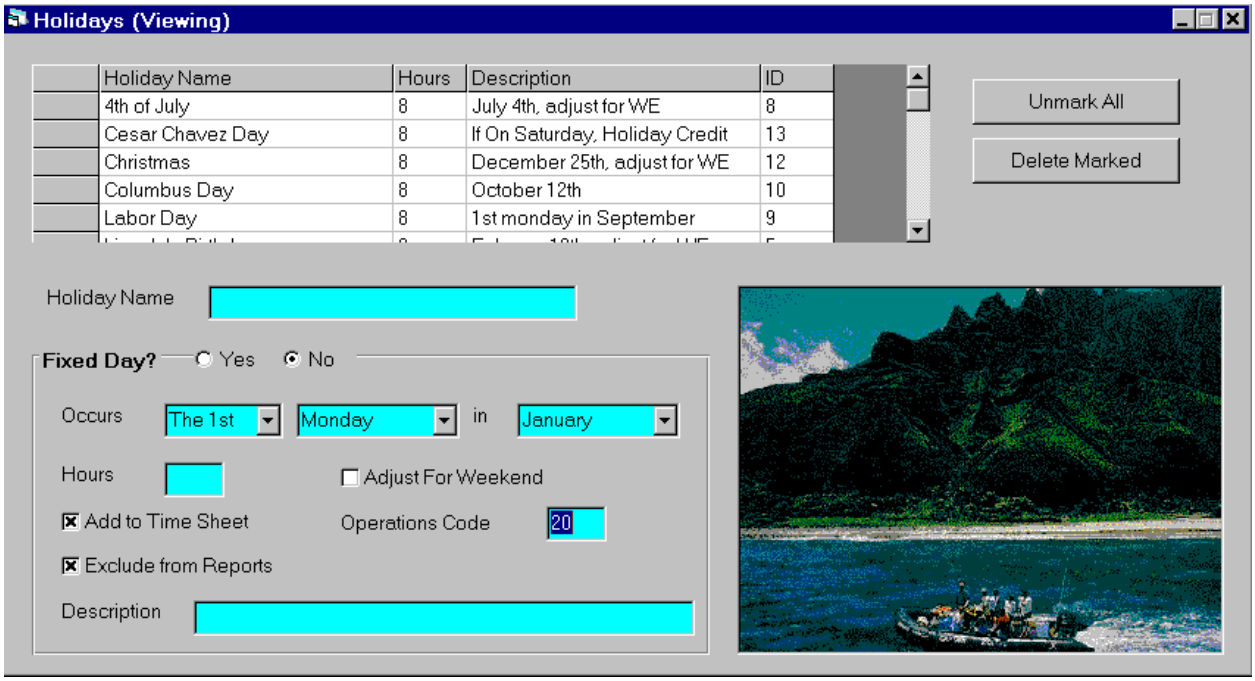
Adjust For Weekend

This sets the holiday, if it falls on Sunday to be put on Monday, or if it falls on Saturday to fall on Friday.

Add to TimeSheet

Always marked. When you click in box, the following screen appears:

THIS WILL CHANGE BECAUSE IT DOESN'T ALWAYS NEED TO BE MARKED, DEPENDING ON THE "DAY" IT FALLS ON EACH YEAR, IT MIGHT NOT NEED TO BE MARKED.



Exclude from Reports

Always marked

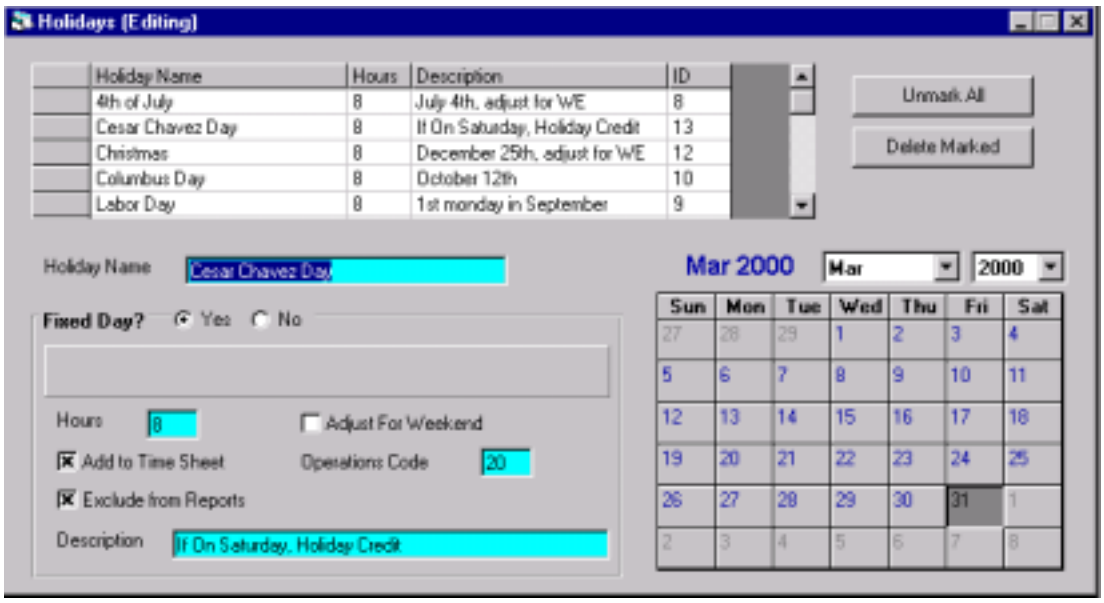
THIS WILL CHANGE BECAUSE IT DOESN'T ALWAYS NEED TO BE MARKED, DEPENDING ON THE "DAY" IT FALLS ON EACH YEAR, IT MIGHT NOT NEED TO BE MARKED.

OP Code # = 20

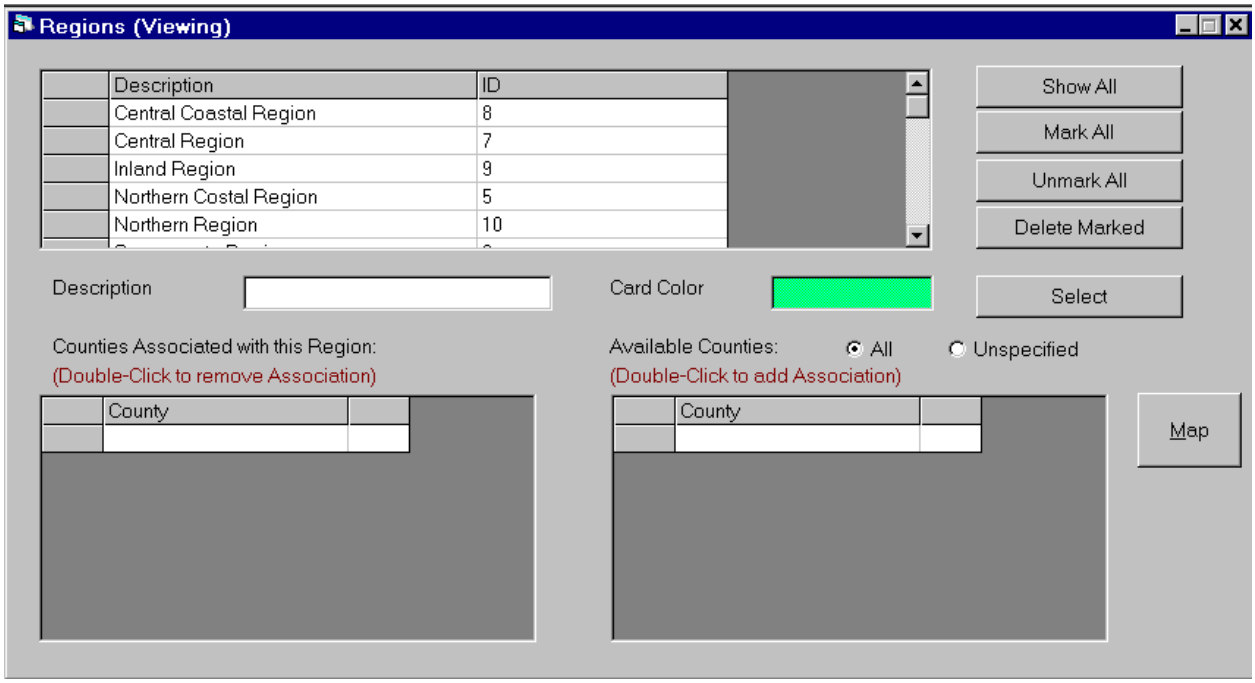
Description: Name of Holiday with a note.

To Edit a Holiday:

Double Click on an exiting Holiday and the editing screen appears.



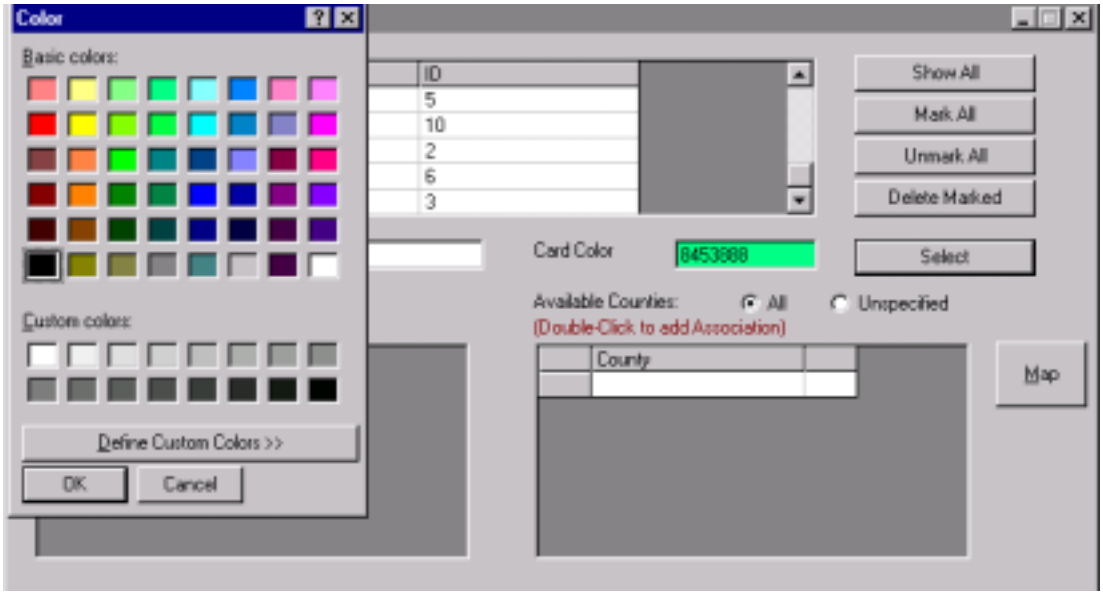
REGIONS:



To Add a Region:

Click Record, Add or Hold Ctrl Touch A

The card color shows a #. Click Select to select a new color. Choose color, Click OK.



At this point, you Save the New Region.

To Add associated counties, you need to be in Edit Mode.

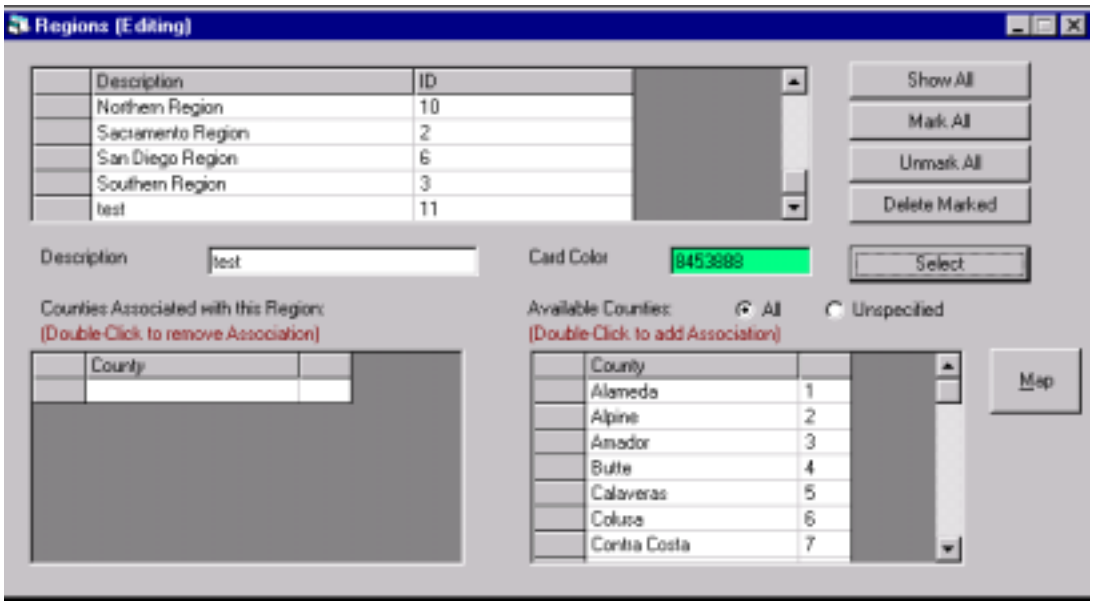
To get to Edit Mode: Double Click existing Region. At the end of the name, type a space or letter. This brings you to Edit mode.

Click on Map to View County location.

Currently you can only create a Region based on county association.
THIS IS GOING TO BE CHANGED TO ADD "CITY".

After you save the new Region, you can associate a county with it. Once you have selected the county, you have no options to edit, undo or save the screen. If you close the form, the county will be saved. Once the county has been saved, it is disassociated from it's original region, and takes the color of the new region. If you click the select button, then click cancel, the color of green will be displayed, and then the Region can be edited, saved or you can click undo.

THIS IS A BUG THAT NEEDS TO BE FIXED.

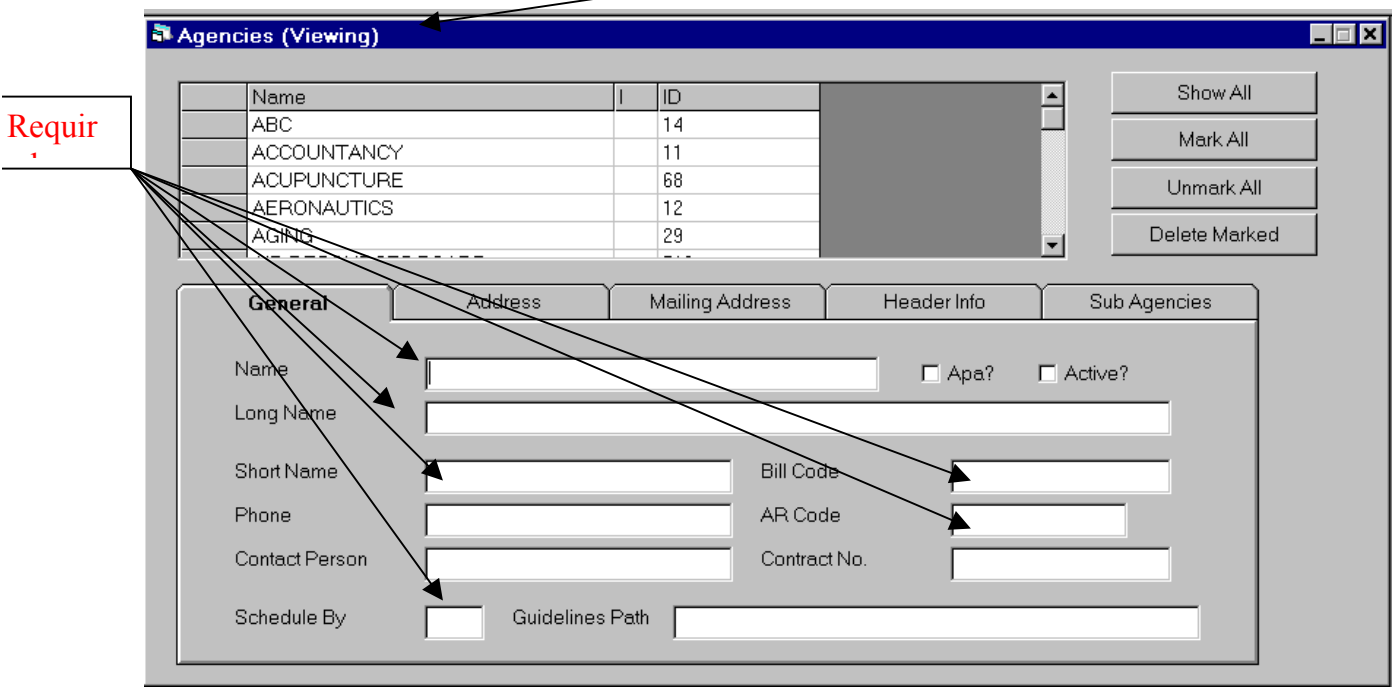


I have no idea what the unspecified button does except not allow you to see any counties.

ACCOUNTING ADMINISTRATIVE TOOLS
TABLES

Changes to Adding or Editing

AGENCIES:



To ADD a new agency:

Start typing in the Name field. The mode changes to "**Adding**" instead of "**Viewing**" mode.

Name = Required Field. The "Name" should be fairly short (15 to 18 characters, including spaces) since it appears on the agency pick list. The maximum number of characters allowed is 30, but the whole name is not viewable after it is selected. Type name in uppercase

APA and **Active** automatically are marked.

APA = Not a Required Field. Agencies that are mandated to use OAH or Agencies that choose to use OAH and abide by the APA rules. Mark box if APA. Unmark box if not APA.

Active = Not a Required Field. Currently active Agency. Mark box if Active. Unmark box if not Active.

Long Name = Required Field. A more descriptive name, including both the department and unit name, i.e.:

CORRECTIONS, DEPT. OF, HEALTH CARE SERVICES DIVISION
TOXIC SUSBTANCE CONTROL, CERTIFIED UNITED PROGRAM AGENCIES

Type Long Name in uppercase.

Short Name = Required Field. Abbreviated name (10 characters, including spaces):

CSLB
TOXIC-CUPA
CORR-HCSDIV

Type Short Name in uppercase.

Bill Code = Required Field. DGS 5 digit billing code. This is entered preceded by a "0" (zero) as a placeholder for future expansion. The billing code is a required entry.

Phone = Not a Required Field. Should be typed in this format: 916-445-4926

AR Code = Required Field. Defaults to 1610. This can be changed as needed to one of the following.

1610 = State Agency
1620 = Local Agency
1640 = Stull Agency (200) only

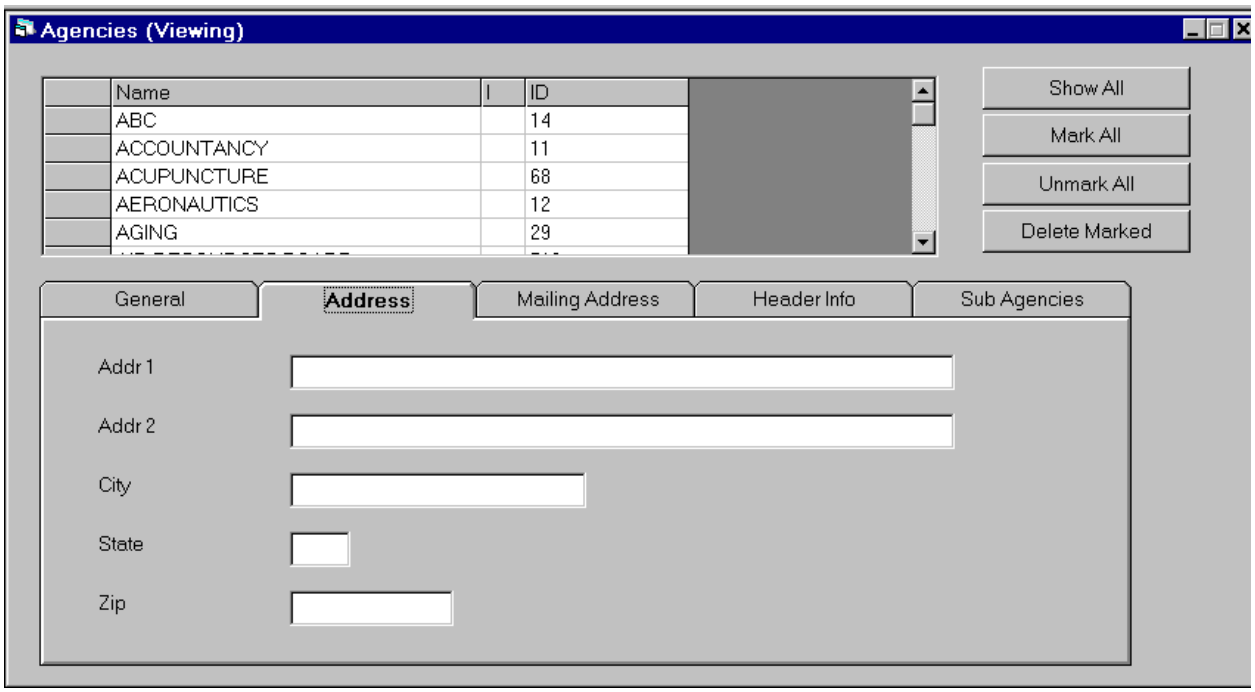
Contact Person = Not a Required Field. Could be Director, Accounting person, etc.

Contract No. = Not a Required Field. This only applies when contract has been prepared for nonAPA agencies.

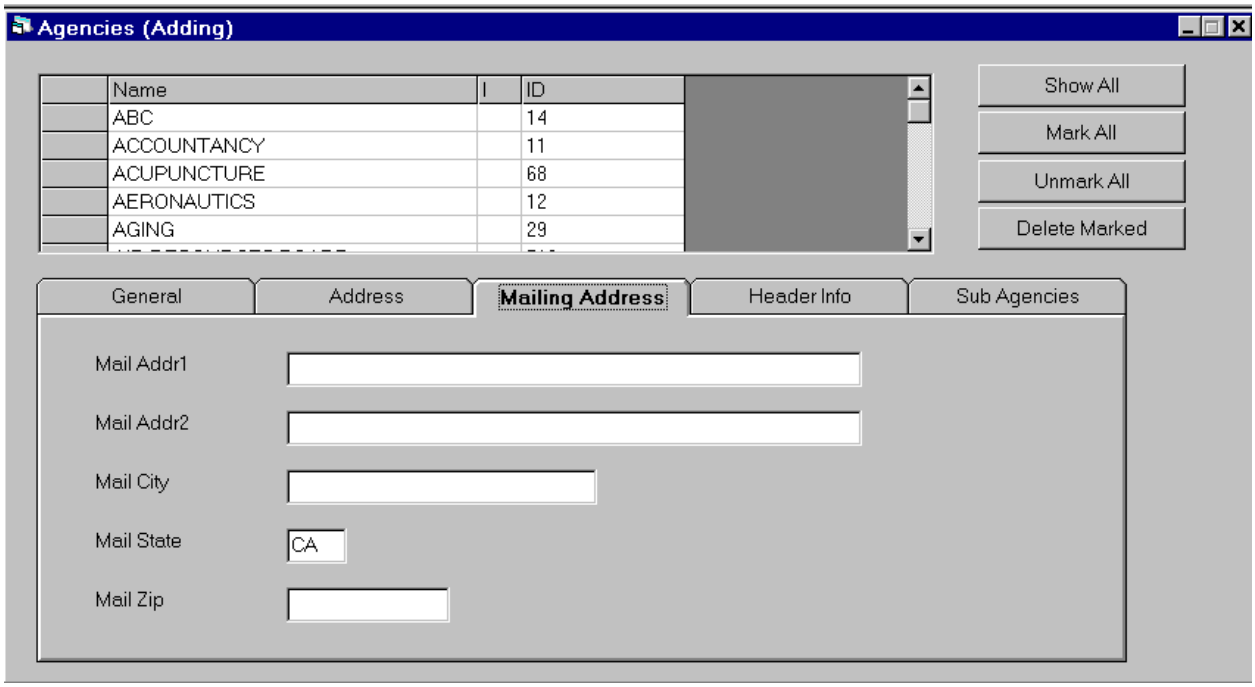
Schedule By = Required Field. Defaults to 30 days. This is the usual timeframe. It isn't being used at this time.

Guidelines Path = This field can be removed.

Address Tab:



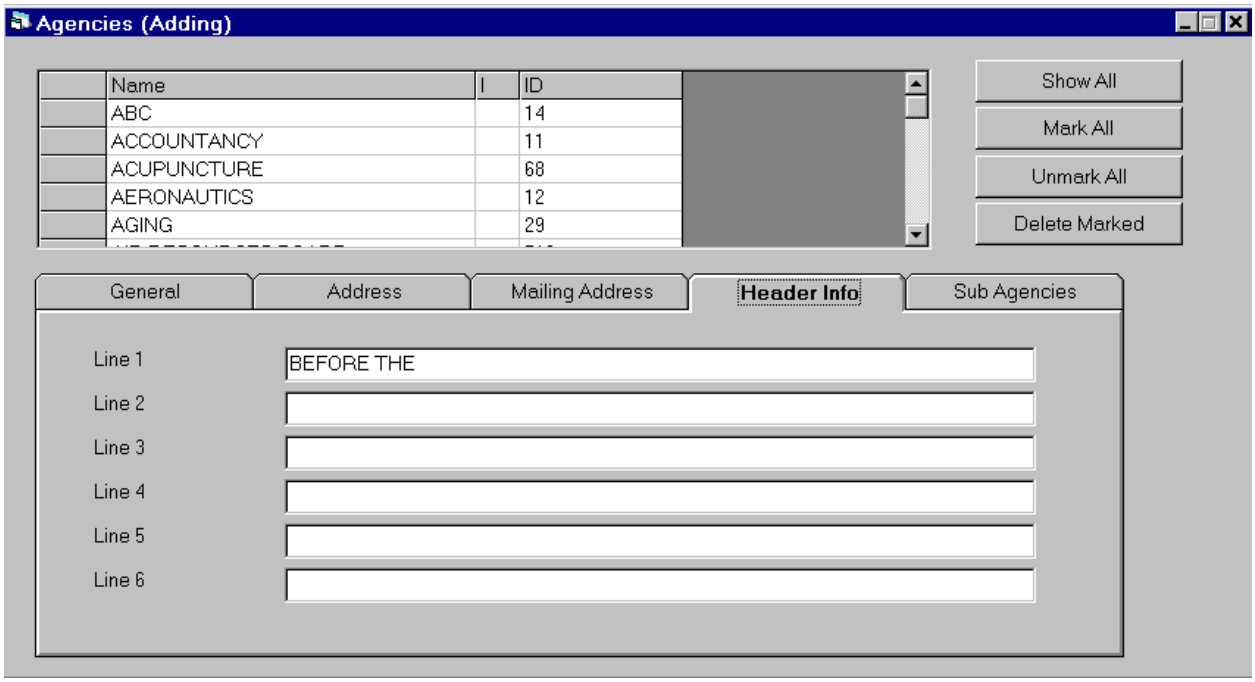
Mailing Address Tab:



These two tabs pretty much could contain the same information. Initially the Address Tab was to contain the address for accounting purposes. The Mailing Address tab was added for the purpose of preparing labels to the agency directors, etc. Neither tab is being fully utilized.

Header Info Tab:

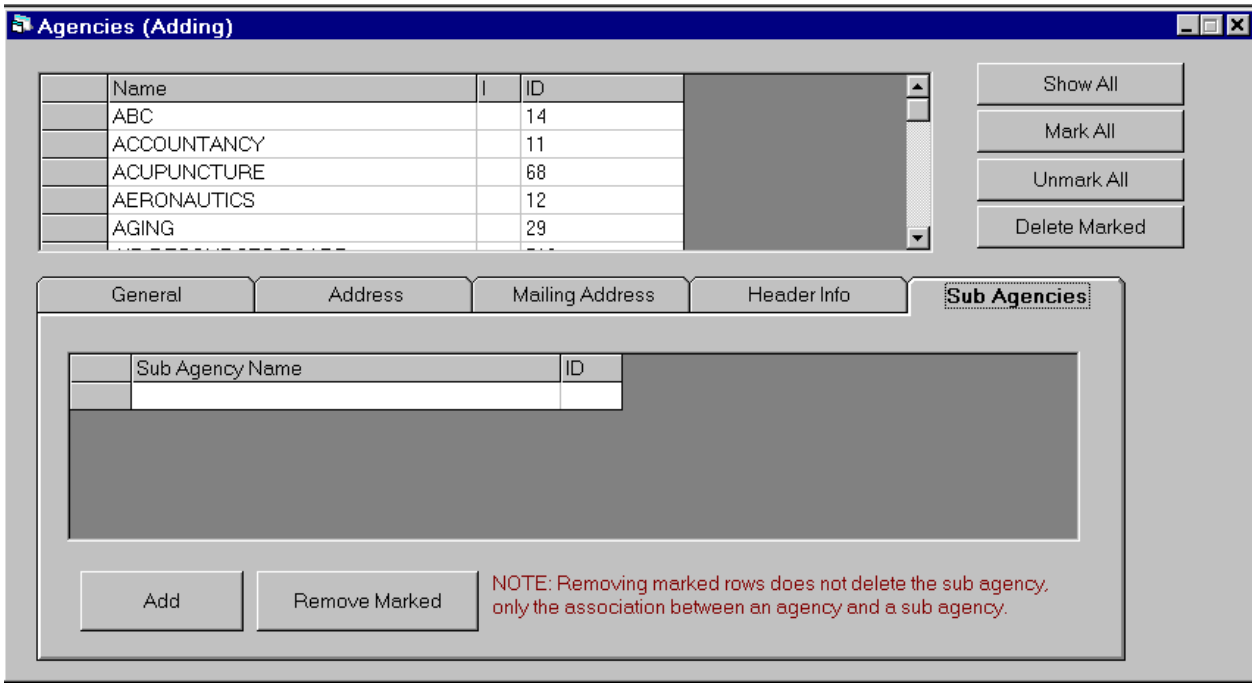
Enter (all in uppercase) the header information for the Proposed Decision, Dismissal, etc***. BEFORE THE*** is the standard first line. Usually the Agency's official name is entered on the second line, i.e. DEPARTMENT OF CORPORATIONS, DEPARTMENT OF REAL ESTATE, etc. The last line is always STATE OF CALIFORNIA. It is not necessary to use all 6 lines.

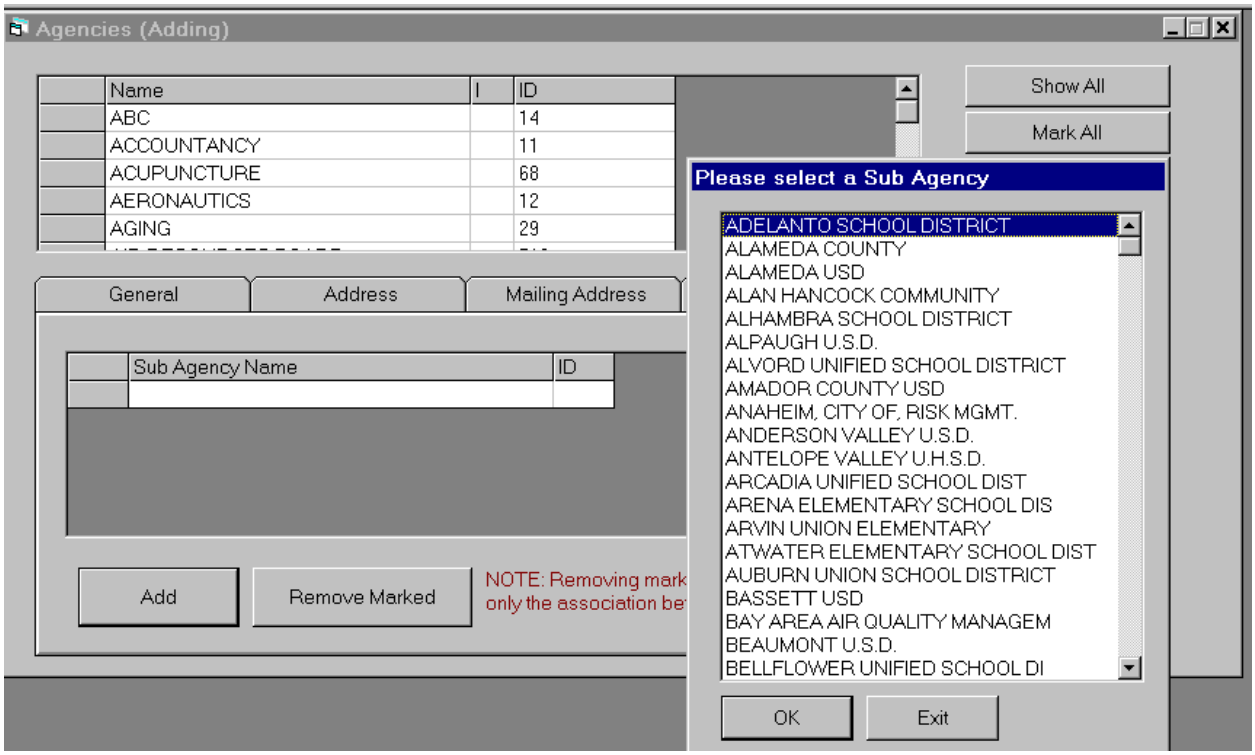


SubAgencies Tab

Click Add Button to retrieve a list of SubAgencies. When you find the agency, double click on the agency or click ok after you have highlighted the agency. You can only add one agency at a time.

If you have added a SubAgency incorrectly, highlight it, **Click** Remove Button. This only removes the association of the subagency with the agency. It does not remove the subagency.

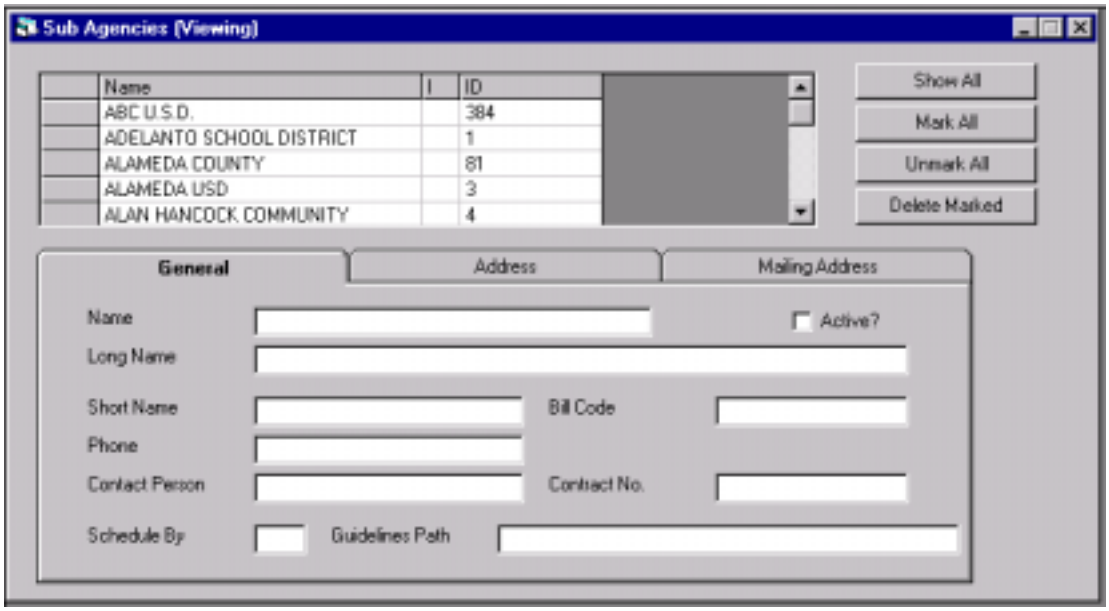




To Save, **Click** Record, **Click** Save, or **Click** Disk on toolbar.

When a new Agency is added, notify all offices and give a brief description and relevant information regarding timelines, etc., if available. This information should be obtained from the PJ, Director or Staff Counsel.

SUB AGENCIES:



To ADD a new sub agency:

Start typing in the Name field. The mode changes to "**Adding**" instead of "**Viewing**" mode.

Name = Required Field. The "Name" should be fairly short (15 to 18 characters, including spaces) since it appears on the sub agency pick list. The maximum number of characters allowed is 30, but the whole name is not viewable after it is selected. Type name in uppercase

Active? = Not a Required Field. It is automatically marked as the default. Currently active Sub Agency. Mark box if Active. Unmark box if not Active.

Long Name = Required Field. A more descriptive name, i.e.:

ALAMEDA COUNTY RISK MANAGEMENT

ANDERSON VALLEY UNIFIED SCHOOL DISTRICT

Type Long Name in uppercase.

Short Name = Required Field. Abbreviated name (10 characters, including spaces):

ANDERSON

ALAMEDA CO

Type Short Name in uppercase.

Bill Code = Required Field. DGS 5 digit billing code. This is entered preceded by a "0" (zero) as a placeholder for future expansion. The billing code is a required entry. This DGS billing code is a code that is assigned by OAH to a local agency. It is possible that even though it is not currently listed in our sub agency list, a number has been assigned. This needs to be confirmed via ABMS.

Phone = Not a Required Field. Should be typed in this format: 916-445-4926

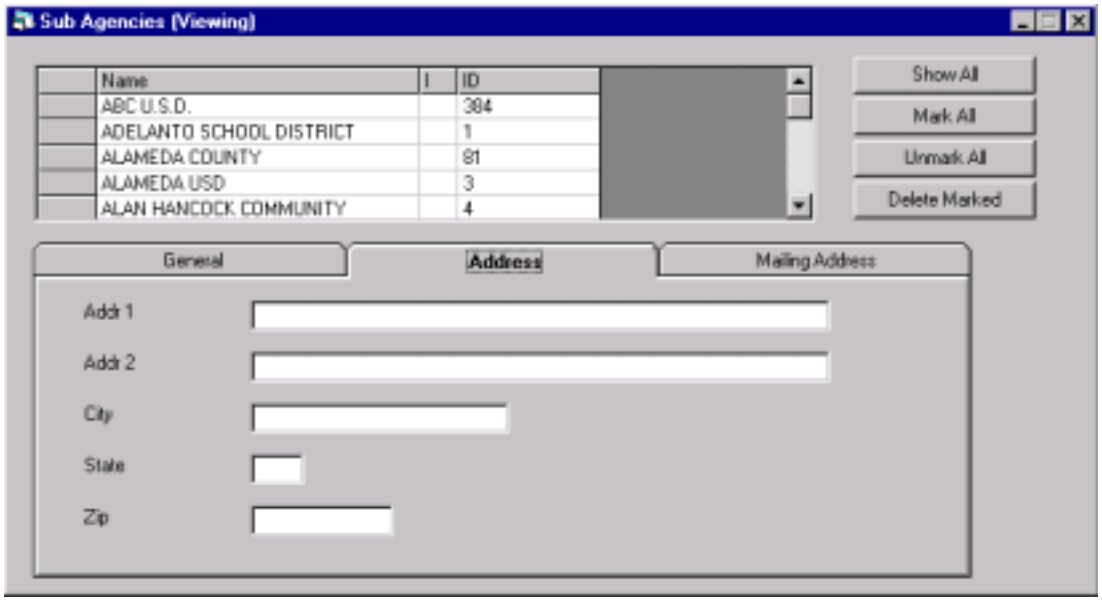
Contact Person = Not a Required Field. Could be Director, Accounting person, etc.

Contract No. = Not a Required Field

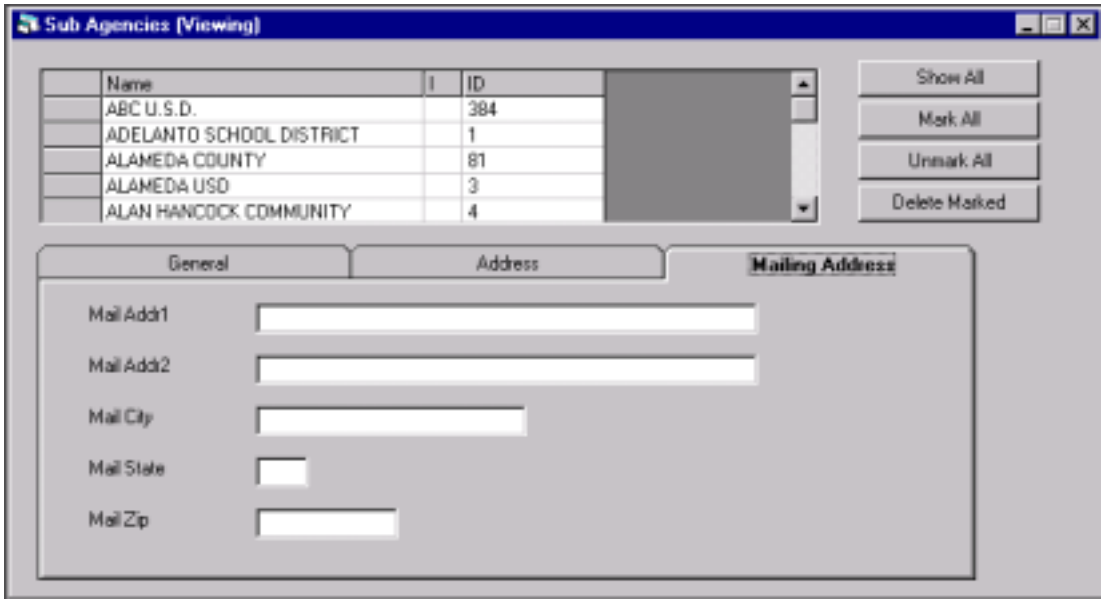
Schedule By = Required Field. Defaults to 30 days. This is the usual timeframe.

Guidelines Path = This field can be removed.

Address Tab:



Mailing Address Tab:

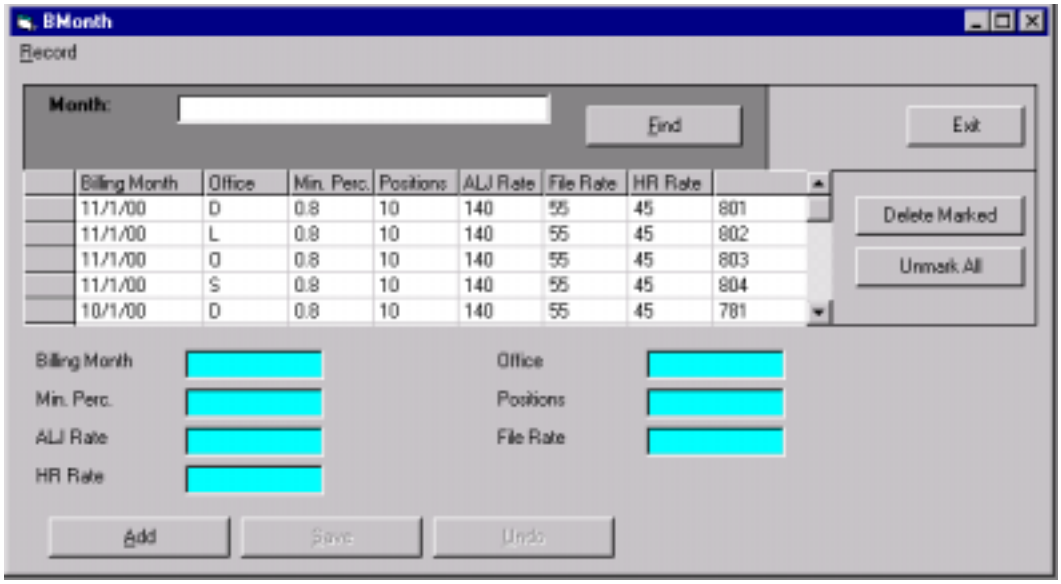


These two tabs pretty much could contain the same information. Initially the Address Tab was to contain the address for accounting purposes. The Mailing Address tab was added for the purpose of preparing labels to the agency directors, etc. Currently the Mailing Address tab is being utilized to complete the address information. These are not required fields, but the information should be filled in.

There is no need to notify all office staff that a SubAgency has been added. Usually it is only necessary to notify the requesting staff member that it has been added so that the SubAgency is now on the pick list.

BILLING MONTH:

CHANGING THE FILING FEES, ETC. AT THE BEGINNING OF THE FISCAL YEAR IS A MANUAL PROCESS. AS SOON AS THE BUDGET HAS BEEN PASSED AND (HOPEFULLY) BEFORE THE FIRST BILLING MONTH IS TO BE BILLED, THESE NEED TO BE UPDATED. IT IS THE RESPONSIBILITY OF THE ACCOUNTING SECTION.



Currently the Billing Month is updated via a scheduled task on the SQL Server to run a stored procedure. It is not likely that a billing month will need to be added.

Editing billing months usually only requires changing the following fields. For a specific billing month, each of these would have to be changed for each office. The rates currently apply to all offices.

OFFICES
D = San Diego
L = Los Angeles
O = Oakland
S = Sacramento

ALJ Rate = Administrative Law Judge hourly billing rate. (This usually only changes at the beginning of a new fiscal year, i.e. July 1.)
HR Rate = OAH Court Reporter hourly billing rate. (This usually only changes at the beginning of a new fiscal year, i.e. July 1.)

File Rate = Case Filing Fee. For each case opened, the Agency is charged a flat filing fee. (This usually only changes at the beginning of a new fiscal year, i.e. July 1.)

Check with DataBase Administrator before changing any other fields on this Table

Edit the Agency/SubAgency codes after a new case has been saved.

Before an Agency or SubAgency Code can be changed:
1) Check the filling date to see if the filing fee has been billed yet. Billing is for 1 month in arrears and is usually completed by the 20th of the month.
2) If the filing fee has **not** been billed, then the Agency or SubAgency Code can be changed without doing anything else.
3) If the filing fee **has been billed**, then a credit has to be issued to that agency for that filing fee and the new agency billed for the filing fee.
4) The Agency Report needs to be run for the initial agency for whatever timeframe is affected to see what other billings have been charged to the initial agency. Once the report has been run, and the amount of credit to that agency and the rebilling amount to the new Agency/SubAgency has been determined, then the Agency Code can be changed.

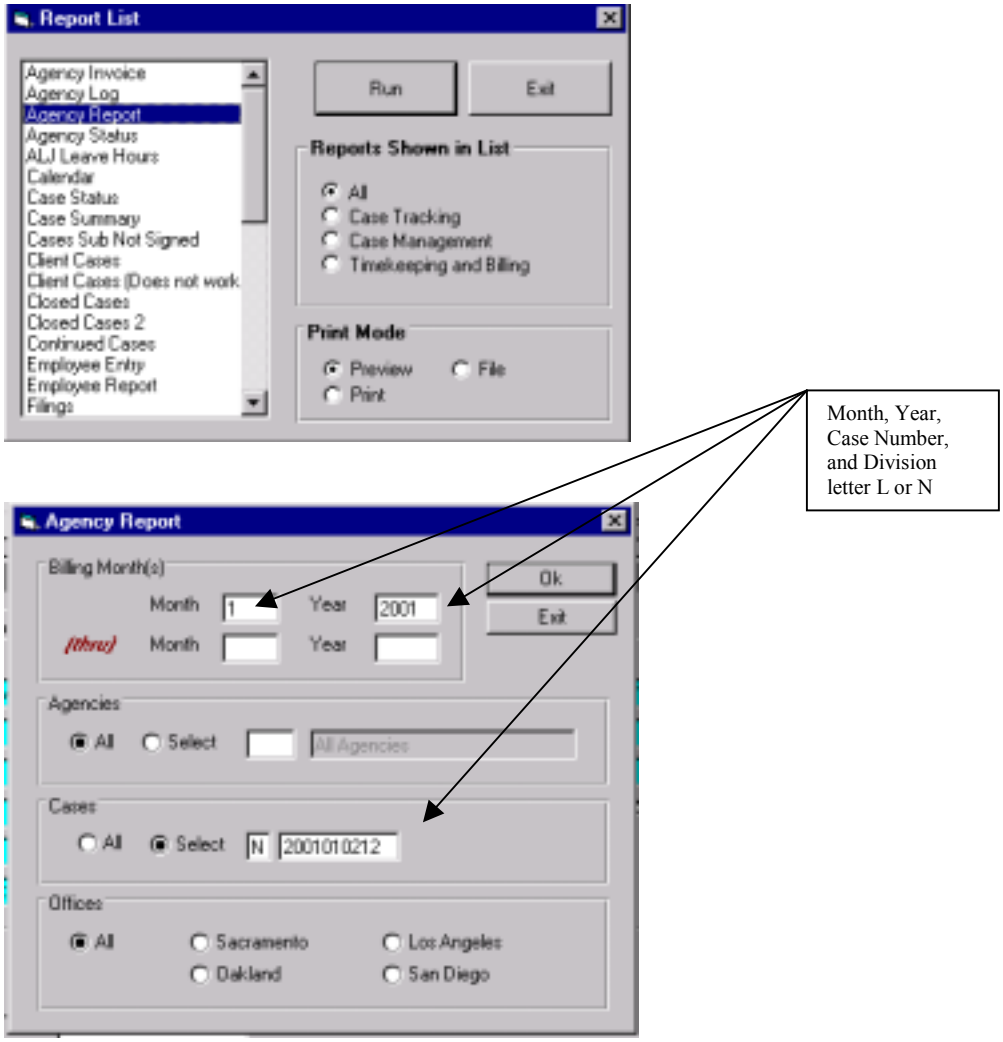
5) To Run Report:

Click Reports on Menu Bar

Highlight Agency Report, Double **Click** or **Click** "**Run**" Button

Under Billing Month, fill in month to run. This would include the month and year filed, through the current date and year. It is necessary to run ***each*** month individually from date filed to current in order to credit for each month on the ledger.

Under Cases, **Click** the "**Select**"circle. Fill in the Case Number, including the Division letter L or N. Click OK. Print the report(s) as needed.



TimeSheet Entries and or edits on all ALJs/Protems/Annuitants.

Protems and Annuitants send their timesheets to OAHSac for entry. It is necessary to make these entries prior to preparing the monthly billings. ***Make sure the Billing Month is correct*** before making the entries.

Deleting cases.

Before a case is deleted:

1) Check the filing date to see if the filing fee has been billed yet. Billing is for 1 month in arrears and is usually completed by the 20th of the month.

2) If the filing fee has **not** been billed, then proceed to number 4) below.

3) If the filing fee **has been billed**, then a credit has to be issued to that agency for that filing fee.

4) The Agency Report needs to be run for the agency for whatever timeframe is affected to see what other billings have been charged to the agency. Once the report has been run, and the amount of credit has been determined, then the case can be deleted.

5) To Run Report:

Click "**Reports**" on Menu Bar

Highlight "Agency Report" on the list, Double **Click** on the report, or **Click** "**Run**" Button (see sample above under "Edit Agency/SubAgency codes after a new case has been saved".)

Under Billing Month, fill in months to run. This would be the month and year filed, through the current date. It is necessary to run ***each*** month individually from date filed to current in order to be able to credit for each month on the ledger. (See samples above under "Edit Agency/SubAgency codes after a new case has been saved".)

Under Cases, **Click** the "**Select**" circle. Fill in the Case Number, including the Division letter L or N. **Click** OK. Print the report(s) as needed.

6) If time has been charged to the agency, it will be necessary to go to each timesheet and delete that time before the case can be deleted. The agency report shows the charges by ALJ Employee number and since you have run the report for a specific month, it should be pretty clear which entries need to be deleted. Print the timesheets affected before making changes.

(**NOTE**: After selecting ALJ and the correct timesheet, **Click** on "Month" in the right hand corner of the timesheet to be able to scroll through all the entries for the month, rather than doing a daily search.

7) To Delete a Case:

Click on Respondents Tab. If a Respondent is listed, then **Click** "Mark All" Button. **Click** "Delete Marked".

Click Hearings Tab. If hearings are listed, **Click** Hearing Reporters for each day of hearing. If a Reporter is listed, then **Click** "Mark All" Button. **Click** "Delete Marked" Button.

Click Exit to return to Hearings Tab. If hearings are listed, then **Click "**Mark All" Button. **Click "**Delete Marked" Button.

Close case form. **Click** on in right corner of form.

Click on the gray box next to the case name that you wish to delete. These marks appear in that box .

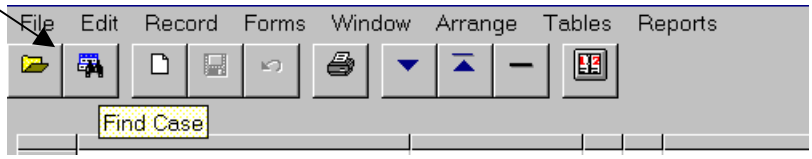
To the right of the grid listing the cases, **Click** on "Delete Marked Cases".

You will be prompted with a message: "Are you sure? This process is irrevocable." **Click** Yes. If you receive a message that the case cannot be deleted, it is because something still needs to be deleted either on the case form or on a time sheet. Review the above steps to make sure all has been deleted. If necessary, rerun the reports to make sure the timesheets have been cleared. Try to delete the case again. Check with the DataBase Administrator if this continues.

After the case has been deleted, the Accounting Section will retain copies of the timesheets (if any) and agency report (if any).

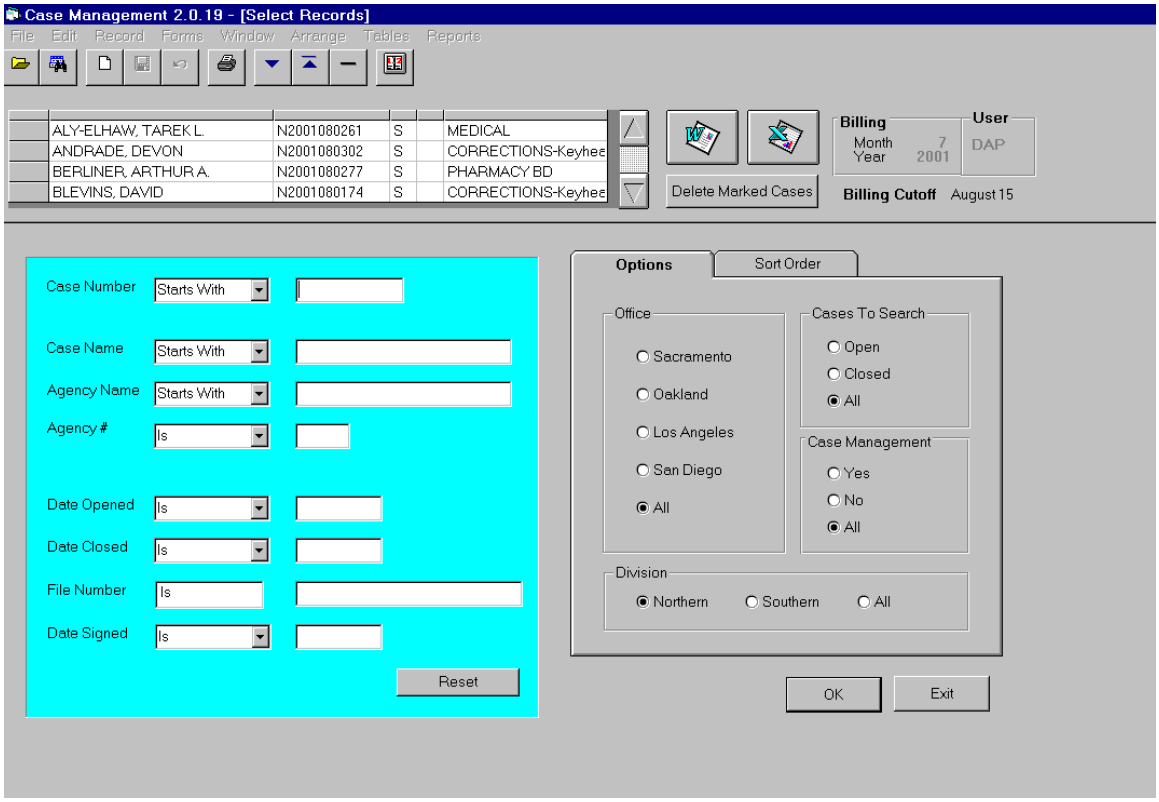
Searching

Click on the Binoculars on the tool bar (or hold the Ctrl key and touch F.

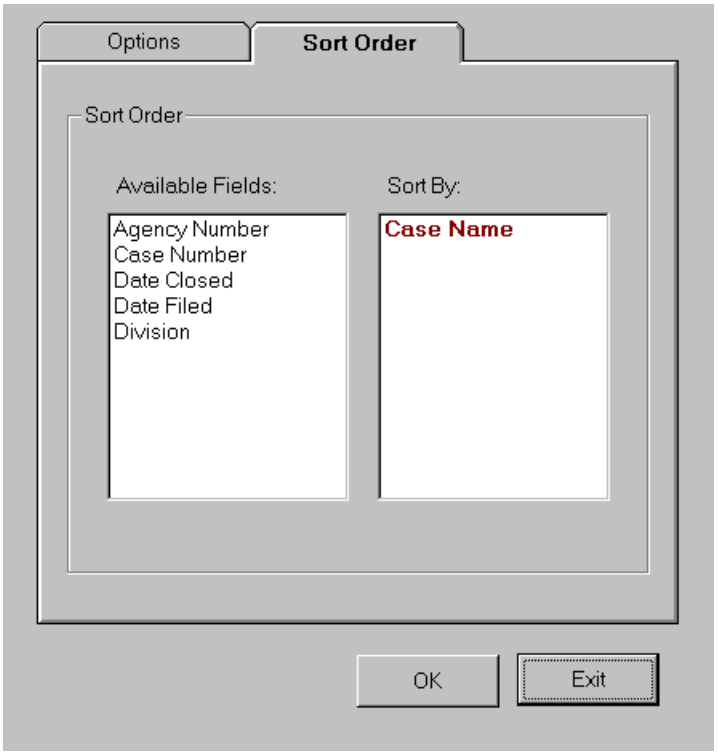


Searches can be made by Case Number, Case Name, Agency Name, Agency No., Date Opened, Date Closed, Agency File No., or Date Signed. The Results will appear in the grid at the top of the screen.

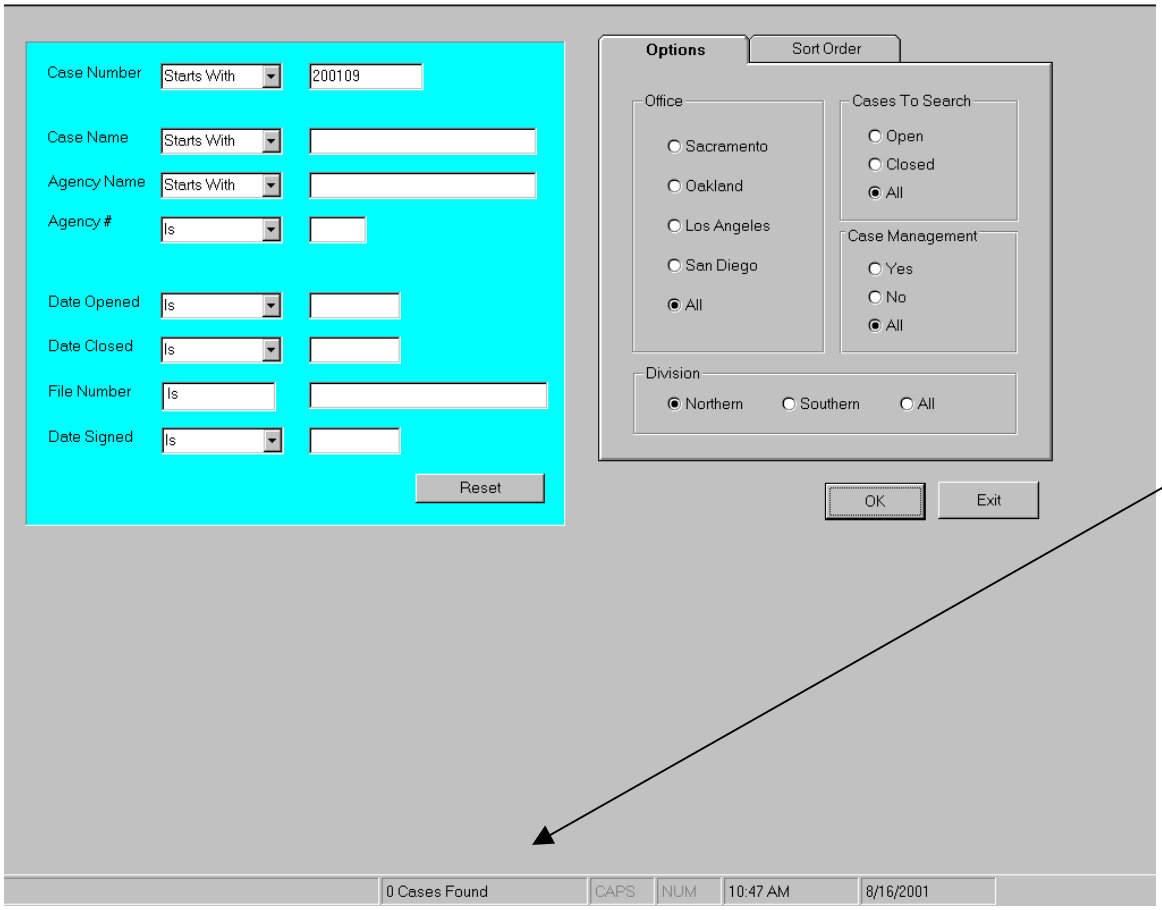
The search automatically defaults to your office set of data. If you need to change this, select another office, or all offices or select the Northern or Southern Division, or All Divisions.



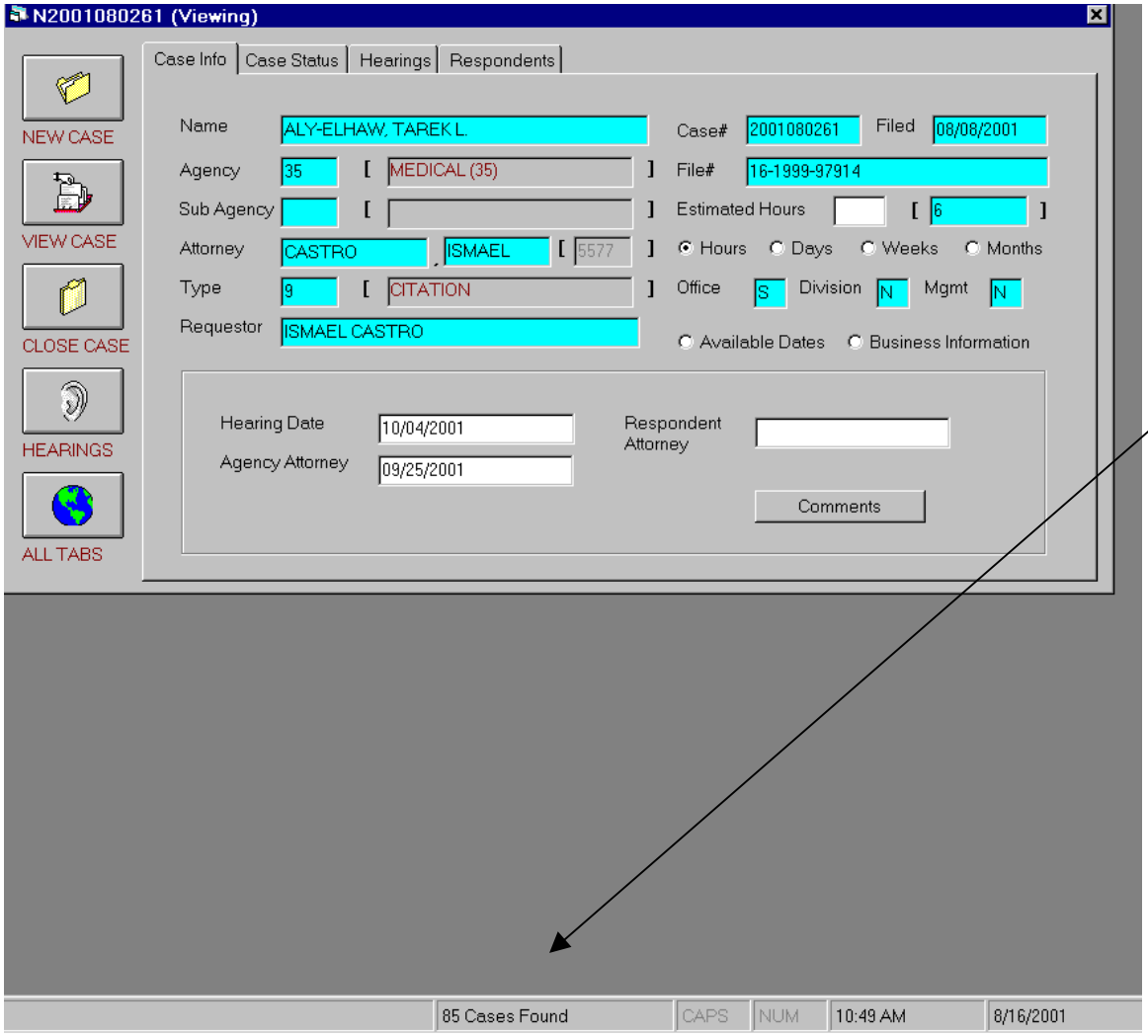
The data is automatically sorted by Case Name. If you wish to have it sorted differently, i.e., by Agency Number, Case Number, Date Closed, Date Filed or Division, select one of these from the Available Fields List in the Sort Order Tab. To remove the "Sort By" field, double click on it. To add a field, double click on the item in the Available Fields List. It is now under the "Sort By" List.



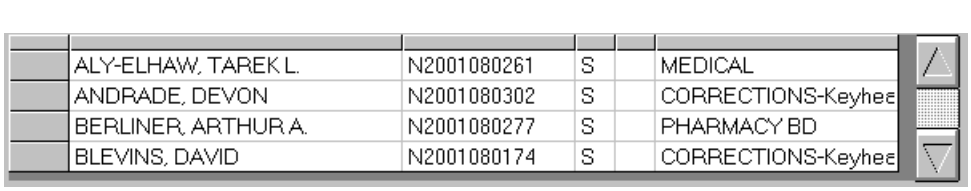
If you search for something that isn't found, you will get a beep from the computer, but no message. If you look at the status bar at the bottom of the screen, you will see "0 Cases Found". This means you will need to change your search or the item you are searching for is not in the database.



When a search is complete, you will return to the "Cases" screen, the results will appear in the grid at the top of the screen. At the bottom of the screen on the status bar you will see "# Cases Found".



If you click on the up and down arrows to the right of the grid, you can go through the list 4 at a time.



The grid shows the case name, the division and case number, the office, closed (represented by an X in the column) and the agency name.

If you double click on one the cases in the grid, the case information screen opens for that case.